

MAGIC SYSTEM MANUAL

MARKEL® MARINE



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ACCESSING MAGIC

To gain access to the MAGIC site, open up a session on your internet browser. Type in the following URL <https://magic.markelamerican.com/magic>.

Press “ENTER” or “GO” and the MAGIC Welcome screen will appear as shown below.

WELCOME SCREEN

An authorized username and password are required to log in to the MAGIC site.

1. Enter your “Username”.
2. Enter your “Password”.
3. Click the “Sign In” button.

The screenshot shows a Microsoft Internet Explorer window with the title bar "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar contains the URL "https://maicmgcwebint1:8085/Express21/default.aspx". The main content area features the Markel logo and the text "MARKEL AMERICAN INSURANCE COMPANY". Below this, a message reads: "Welcome to the **Markel American Insurance Company** rating and underwriting web portal. We are committed to offering the highest quality service to assist our agents throughout the lifecycle of a policy. This tool is designed to facilitate the quoting, submission, and maintenance of policies. To gain access to this site, you must log in with a registered username and password." A sub-message below states: "If you have an account, you may use your username and password to gain access." A login form titled "Existing Customers" is displayed, containing fields for "Username" and "Password", and a "Sign In" button which is circled with a red arrow. There is also a checkbox for "Remember my username and password." At the bottom, a disclaimer states: "Disclaimer: This site uses cookies stored on your local machine in order to remember your name and password. Your browser must support cookies in order to remember your password."

The system will prompt a new User to change their password the first time they log in. See the section on Passwords for the required password format.

If you do not have a User account and need to have one set up, please complete the “Request to Amend Established User” form found at the back of this manual. All requests for new users must be completed by the General Agent.

Please email the completed form to PTS@markelcorp.com or Fax: 262-547-9436.

Once your user profile has been established, you will be emailed with a username and password to give you access to your account.

NAVIGATION TOOL BAR

HOME PAGE

Once logged in, the Home Page will display as shown below.

This screen will show any new and/or overdue messages that are in your Inbox. At any time while in the MAGIC system, simply click on “Home” and you will be brought back to this screen.

The screenshot shows a Microsoft Internet Explorer window displaying the MARKEL AMERICAN INSURANCE COMPANY website. The title bar reads "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "http://corpwebuat30:8083/Express30/default.aspx". The main content area has a blue header with the company logo and name. Below the header, there is a navigation menu with links like Home, New, Open, Diary, Save, Password, Batch, Change Association, and Logout. A message "Current Association: MARKEL AMERICAN INSURANCE CO" is displayed. On the left, a sidebar shows a welcome message "Welcome, Jennifer Fredrick External" and a "New messages" section with an envelope icon. The main body contains a "Messages" table with one row:

Date	User ID	Activity Description	Policy #	Eff Date	Attachments
Originated	Originated				
2007-04-04	jfredrick	Approve QT00000000187 has been approved on 2007-04-04	-	-	-

Below the table, it says "Showing 1-1 of 1 total message(s)".

To retrieve/open a message in your Inbox, click on the description for that message. The description is displayed in a different color. If you hover over the description with your mouse, the description will be underlined. This is called a hyperlink. By clicking on this hyperlink, as directed above, you will retrieve the message, and a new screen (as shown below) will appear.

The message displays with a great deal of information much like an email. Of special importance is the middle section which shows the message/reason (see area outlined in green below).

Reminder: This message Inbox is not a private Inbox like email. This is simply a messaging system.

Market American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites

Address Go Links >

Current Association: AMERICAN UNDERWRITING MGRS AGCY INC
[Message Details]

Message Details * indicates a required field.

Message Information

Create Date:	Created By:	Closed Date:	Closed By:
2007-04-04 16:10:02	jfrederick		System

Policy Information

Agency:	Client:	Quote Number:
American Underwriting Managers	John Dwyer	QT00000000187

Message

Security Level:	Activity/Reason:	Priority:	Due Date:
Public	Approved	Medium	N/A

Subject: QT00000000187 has been approved on 2007-04-04
Body: The transaction has been approved on 2007-04-04. Test reply.

Message Recipients

Category:	Recipient:	Policy/Client ID:
Specified Agency	AMERICAN UNDERWRITING MGRS AGCY INC	N/A
Specified Agency	American Underwriting Managers	N/A
Policy-Level	N/A	2122

Date Attachments Caption FileName

File to upload:

Enter caption:

Accept Message:

Upon clicking "Accept Message" and "Update Details", the message will disappear from the other Inboxes that it was in. Other users will then be unable to retrieve the message to work on.

Once you have accepted the message you have taken ownership of it. You may then load the policy to work on it.

Load Policy:

If the message originated from within a quote or policy, you may click the "Load Policy" button and this will take you directly inside the specific quote or policy.

Delete Message:

Once you are through with the message, you may delete the message by clicking on the "X" button that appears to the right of the Message Recipients area.

Update Details:

When drafting a message, clicking on update details is equivalent to sending the message.

Add Attachment(s):

Just as in a regular email, you may also add an attachment (see area outlined in pink above).

To add an Attachment:

1. Click on “Browse”.
2. Search your computer to find the document you’d like to attach.
3. Once you’ve found the document, click on the document name and then click on “Open”.
4. In the “Enter Caption” field, enter the name of how you would like the attachment labeled.
5. Click “Add Attachment” to attach the file.

Close:

Clicking “close” just closes the message so that it can be viewed later.

NEW

Clicking on “New” takes you to the new quote screen.

The screenshot shows a Microsoft Internet Explorer window displaying the 'New Quote Selection' screen for Markel American Insurance Company. The window title is 'Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer'. The address bar shows the URL 'http://corpwebuat30:8083/Express30/default.aspx'. The main content area has a blue header with the company logo and name. Below the header, there's a navigation bar with links like Home, New, Open, Diary, Password, Batch, Change Association, and Logout. A sub-header indicates the current association is 'MARKEL AMERICAN INSURANCE CO'. The main form starts with a 'New Quote' button. It then asks 'Select the Agency and Producer' with dropdowns for 'General Agent' (with '(Select General Agent)' as the placeholder), 'Producer Name' (with '(Select Producer)' as the placeholder), and 'Producer Number' (with '* N/A' as the placeholder). There's also a 'Find Producer' button. Next, it asks 'Select the Product and Program' with a dropdown containing '(select)'. Then, it asks for 'Quote Effective Date' with the value '2/14/2008'. Finally, it asks 'Enter the Risk Location ZIP Code and TAB out of field' with fields for 'Location ZIP Code' (containing a placeholder) and 'Location State' (containing a placeholder). The bottom right corner of the browser window shows 'Local intranet'.

*For directions on how to process a New Quote,
please see the section titled “Processing a New Quote” that follows.*

OPEN

Clicking “Open” will take you to the screen where you can:

- search for an existing quote or policy
- search for items that have been sent for referral for your office to approve, decline, etc.

Quick Search:

On the left hand side is a series of fields that are used in the Quick Search function. To quickly build a search filter, enter in a value or partial value, and/or select a value from the drop list. Then click the button to the right of each field you would like to search for. For example to search for the name “Smith,” you would enter “Smith” into the name field and click the name button. To narrow the search you could set the LOB to Markel Small Boat by selecting Markel Small Boat from the LOB drop down and pushing the “Set LOB” button.

Advanced Search for a Quote or Policy:

On the right hand side is the Filter Builder which allows you to select the criteria you would like to use to search for an existing quote or policy. (see screen shot below)

The screenshot shows the user interface for searching quotes or policies. It includes a top navigation bar with links for Home, New, Open, Diary, Save, Password, Batch, Change Association, and Logout. Below the navigation is the company logo for "MARKEL AMERICAN INSURANCE COMPANY". On the left, there's a "Quick searches:" section with three input fields: "Name" (containing "Smith"), "Quote/Policy #" (containing "1234567890"), and a "Set LOB" button. On the right, there's an "Advanced Search" section with dropdowns for "Name" (set to "contains") and "Quick Query" (empty). Below these are "Current Filters" buttons for "Show All", "Apply Filter", "Clear Filter", and "Save Filter". At the bottom, there's a table header with columns for Policy/Quote Number, Insured Name, State, Line, Status, Transaction, Description, Eff. Date, and Last Modified.

To use the Filter Builder, use the drop down boxes to select the criteria you wish to filter on.

For example, say a new quote was started, and you can only remember the last name of ‘Smith’.

1. In the first drop down box, select “Name”.
2. In the second Drop down box, select “contains”.
3. In the third box, enter “Smith”.

You can also do partial searches on the insured name by following the instructions above and entering only part of the insured’s name.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Address http://corpwebuat30:8083/Express30/default.aspx Go Links >

MARKEL AMERICAN INSURANCE COMPANY

Home New Open Diary Save Password Batch Change Association Logout

Current Association: MARKEL AMERICAN INSURANCE CO

[Open Existing Quote/Poli](#)

Quick searches:

Advanced Search

and Name contains Quick Query

Current Filters

Name contains SUE

Apply Filter Clear Filter Save Filter

Show Deleted

Policy/Quote Number	Insured Name	State Line	Status	Transaction	Description	Eff. Date	Last Modified
QT00000005039	DEREK SUEHR	PA	SmallBoat_SmallBoat	Quote	New-Pending	2007-07-22	2007-07-22
QT00000000225	sue cisz	ME	SmallBoat_SmallBoat	Quote	New-Pending	2007-04-05	2007-04-05
QT00000000228	sue cisz	ME	SmallBoat_SmallBoat	Quote	New-Pending	2007-04-05	2007-04-05
MSB00000003262	sue cisz	FL	SmallBoat_SmallBoat	Cancelled	Cancel-Committed	2007-06-26	2007-06-26
MSB00000003265	sue cisz	FL	SmallBoat_SmallBoat	Cancelled	Cancel-Committed	2007-06-26	2007-06-26
QT00000003860	sue cisz - test	FL	SmallBoat_SmallBoat	Quote	New-Pending	2007-06-26	2007-08-02
QT00000004493	Sue Nichols	CA	SmallBoat_SmallBoat	Quote	New-Pending	2007-07-10	2007-07-10

Done Local intranet

4. Then click the “Add” button. This will move your selected criteria to the “Current Filters” section. (See screen print above.)
5. Once you have selected all the items you wish to search on, click “Apply Filter” and the system will search for any matches to your criteria. (See screen print above.)

You may add multiple filters to narrow down your search results. Or you may delete filters by clicking on the “X” next to the filter criteria.

Searching for Referred items:

In the middle of the screen there are 2 buttons that allow you to search for items that have been referred to your office for approval—Quote Referral and Service Request (see the area outlined in red below).

Sorting Results:

Clicking on a blue column header will sort the results by the column. Click on the header again to reverse the order.

The screenshot shows the Markel American Insurance Company software interface. At the top, there's a menu bar with File, Edit, View, Favorites, Tools, and Help. Below the menu is a toolbar with icons for Back, Forward, Stop, Refresh, Home, Search, Favorites, and various document-related functions. The address bar shows the URL: http://corpwebuat30:8083/Express30/default.aspx. The main header features the Markel logo and the text "MARKEL AMERICAN INSURANCE COMPANY". Below the header, a message says "Current Association: MARKEL AMERICAN INSURANCE CO". A navigation bar includes Home, New, Open, Diary, Save, Password, Batch, Change Association, and Logout. On the left, there's a sidebar with "Quick searches:" and dropdown menus for Name, Quote/Policy #, and Set LOB. To the right, there's an "Advanced Search" section with fields for Name and Quick Query, and buttons for Apply Filter, Clear Filter, and Save Filter. Below these are "Current Filters" and "Show All" buttons. A large red box highlights the "Quote Referral" and "Service Request" buttons at the bottom of the search area. The main content area displays a table of policy/quote information with columns: Policy/Quote Number, Insured Name, State, Line, Status, Transaction, Description, Eff. Date, and Last Modified. The table shows several rows of data, with the last row being 1-10 811-920 1821-1830 2731-2740 3641-3650 4551-4560 5461-5470 6371-6380 7281-7290 8191-8200. At the bottom right of the main area, there are links for Prev Page and Next Page, and a "Local intranet" link.

Quote Referral:

The “Quote Referral” button allows you to quickly search for quotes that have been referred to your office for approval. When you click on “Quote Referral” a list of all the quotes that have been referred to your office will appear.

Click on the quote # to load the quote to work on it. Review the request and then proceed to the Submission page.

You will have the choice to Approve or Decline the risk or alternatively refer it to MAIC if you desire a 2nd opinion. Once you choose Approve, Decline or Refer, a message box will appear where you may add a message. Add the message and click OK. The risk will then be sent back to the requestor as Approved or Declined, or it will be sent to MAIC as a referral.

Service Request:

The “Service Request” button allows you to quickly search for service items (i.e. endorsements, cancels, etc) that have been referred to your office for approval. When you click on “Service Request” a list of all the service items that have been referred to your office will appear.

Click on the policy number, you will be taken to the [TransACT screen](#).

Market American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Home Mail Print Links

Address https://maicmgcwebint1:8085/Express21/default.aspx

Diary/Attachments David Roth (InForce - Endorse - Committed)
MSB00000003556

TransACT

View Service History Apply Payment

Policy Number: MSB00000003556	Written Premium: \$1,215.00	Effective Date: 03-22-2007	Risk State: NY
Status: InForce	Payment Plan: Six Installments	Expiration Date: 03-22-2008	Rate Effective Date: 03-22-2007
Product: SmallBoat_SmallBoat	Billing Method: Direct Bill	Equity Date:	Last Modified Date: 03-23-2007
Term: 12 Months		Grace Equity Date:	

Insured:
David Roth
12 Test Case Road

555-555-0008

Producer:
10536 - 0000001

Agency:
10536 - 0000001

Review Before Renew has been Completed.

Transaction Type: <Select Type> Go Quick Filter All

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	03-22-2007	03-22-2008	\$1,215.00	\$1,215.00	Committed		03-22-2007
ReviewBeforeRenew	03-23-2007	03-22-2008	\$1,215.00	\$0.00	Committed		03-23-2007
Endorse	04-01-2007	03-22-2008	\$1,331.00	\$116.00	Referred		N/A

Then click on the pencil. You will be taken into the policy to review it and modify it if necessary. Once you have completed your review, click on the Submission tab where you can Decline it or Approve it or put it in Pending status (see area in red below). If approved, the transaction must be committed at some point in order for it to take effect.

Market American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Home Mail Print Links

Address https://maicmgcwebint1:8085/Express21/default.aspx

MARKELE AMERICAN INSURANCE COMPANY

MAIC SmallBoat NY (00.01) Current Association: MARKEL AMERICAN INSURANCE CO (change)

Diary/Attachments David Roth (InForce - Endorse-Referred)
MSB00000003556

Owner Personal Boat Operator Assignment Coverage Risk Location Additional Interest Info Submission

Name: David Roth Endorse / 04-01-2007

Premiums

Total Annual Premium: \$1,334.00	Total Written: \$1,331.00	Prior Total Annual: \$1,215.00	Written Change: \$116.00
----------------------------------	---------------------------	--------------------------------	--------------------------

Review Before Renew has been Completed.

Available Actions:

Refer Decline Approve Pending Modify Reasons Save for Later

<< Back

ICONS

MARKEL AMERICAN INSURANCE COMPANY

Current Association: BOLTON AND COMPANY INC
[Open Existing Quote/Policy](#) Active Session: (none)

Quick searches: Name » Quote/Policy # »

Advanced Search
 and Name contains
 Quick Query:

Current Filters
 Status contains Save Filter Show Deleted

Policy/Quote Number	Insured Name	State	Line	Status	Transaction	Description	Eff. Date	Last Modified
QT00000008365	ABC XYZ	WI	HPBoat_HPBoat	Quote	New-Pending	GA: 10224 - 0000001	2008-02-12	2008-02-08
QT00000008523	AL DENTE	WI	HPBoat_HPBoat	Quote	New-Referred	GA: 10224 - 0000001	2008-01-21	2008-01-30
QT00000008438	AL DENTE	GA	HPBoat_HPBoat	Quote	New-Pending	GA: 10224 - 0000001	2008-01-16	2008-01-16
QT00000008913	ANDY CAT	TX	HPBoat_HPBoat	Quote	New-Pending	GA: 10224 - 0000001	2008-02-05	2008-02-05
QT00000009059	ANOTHER WEEK	TX	HPBoat_HPBoat	Quote	New-Pending	GA: 10224 - 0000001	2008-02-11	2008-02-15
QT00000008994	BAT MAN	FL	HPBoat_HPBoat	Quote	New-Pending	GA: 10224 - 0000001	2008-02-07	2008-02-07
QT00000009161	BEXAR COUNTY	TX	HPBoat_HPBoat	Quote	New-Pending	GA: 10224 - 0000001	2008-02-13	2008-02-13
QT00000009540	BIG BOAT BENNY	TX	HYBoat_HYBoat	Quote	New-Pending	GA: 10224 - 0000001	2008-02-22	2008-02-22

1-10 11-20 21-30 31-40 41-50 51-60 61-70 71-71 [Prev Page](#) | [Next Page](#)

1. View Details & History:

Clicking the “View Details & History” button will take you to the [Detail screen](#).

- 2. Locked Policy:** The padlock icon will appear when another user has the file open/checked out. The name of the user who has it checked out displays on the bottom of the TransACT page.

DIARY

Clicking on “Diary” will take you to your Inbox.

To open a Diary Item, click on the bold description. (The description is displayed in a different color.) If you hover over the description with your mouse, the description will be underlined. This is called a hyperlink.

The screenshot shows a Microsoft Internet Explorer window with the following details:

- Title Bar:** Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer
- Menu Bar:** File, Edit, View, Favorites, Tools, Help
- Toolbar:** Back, Forward, Stop, Refresh, Home, Search, Favorites, Links
- Address Bar:** Address: http://corpwebuat30:8083/Express30/default.aspx
- Content Area:**
 - Header:** MARKEL AMERICAN INSURANCE COMPANY
 - Navigation:** Home, New, Open, Diary, Save, Password, Batch, Change Association, Logout
 - Text:** Current Association: MARKEL AMERICAN INSURANCE CO
 - Query Builder:** A search interface with fields for Sender (contains), Quick Query, Clear, and Search buttons.
 - Table:** A diary entry table with columns: Date, UserID Originated, Activity Description, Priority, Policy #, Eff Date, Due Date, UserID Closed, Closed Date, and Attachments.
 - Data:** One entry: 2007-04-03 krambsby Message Requested 2-Normal - - - - - -
 - Text at bottom:** Showing 1-1 of 1 (show all items)
- Status Bar:** javascript:actOnMessage('3156', 'readMessage');

By clicking on this hyperlink you will retrieve the message, and a new screen will appear.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Home Open Password Change Association

Address https://maicmrgcwebint1:8085/Express21/default.aspx Go Links

Current Association: MARKEL AMERICAN INSURANCE CO (change)

Message Details

Message Details * indicates a required field.

Close Message

Message Information

Create Date: 2007-04-03 Created By: krambsby
09:14:20

Message

Security Level: Public Activity/Reason: Medium Priority: N/A Due Date:

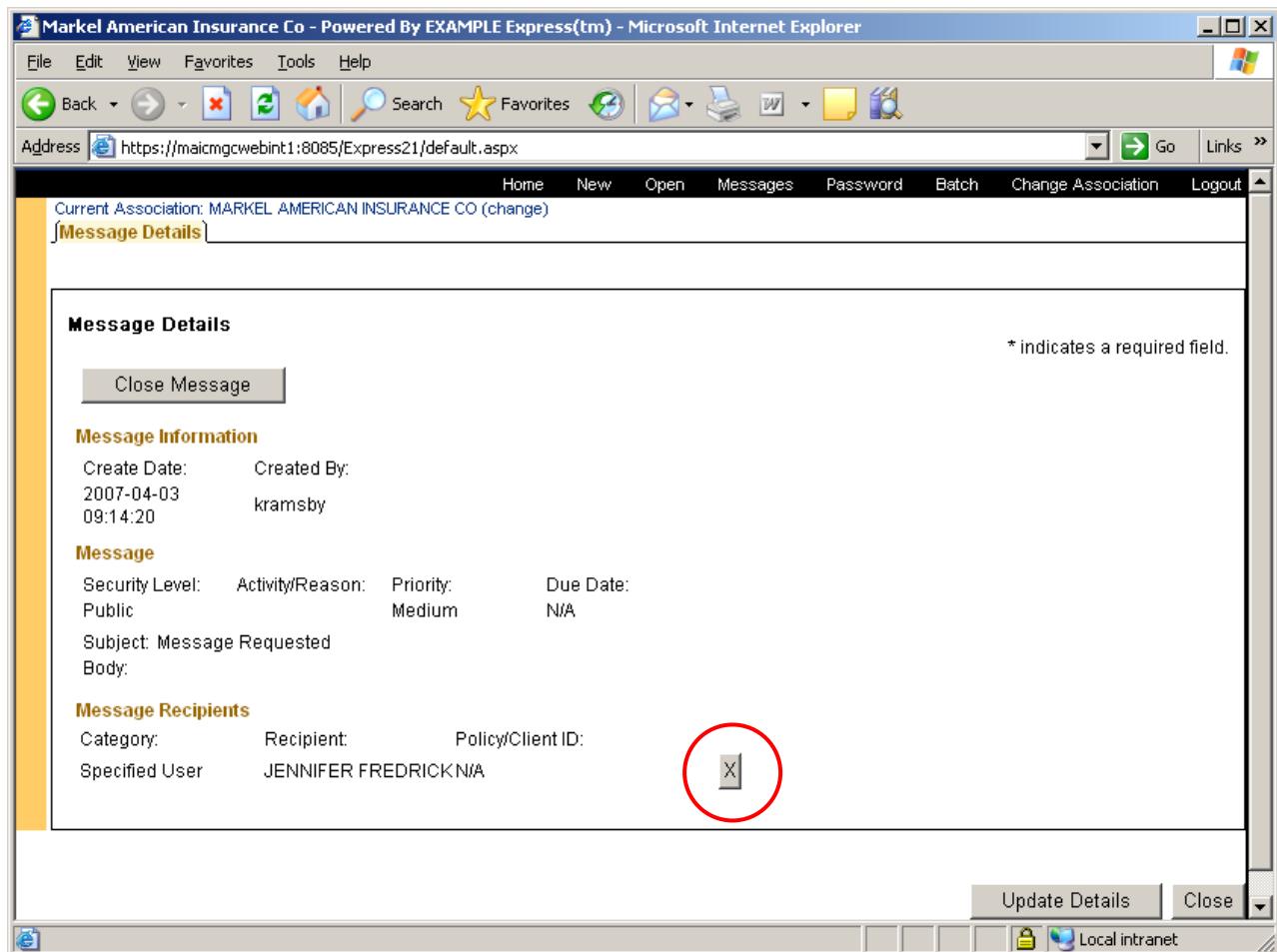
Subject: Message Requested
Body:

Message Recipients

Category: Specified User Recipient: JENNIFER FREDRICK N/A Policy/Client ID: 

Update Details Close

Local intranet



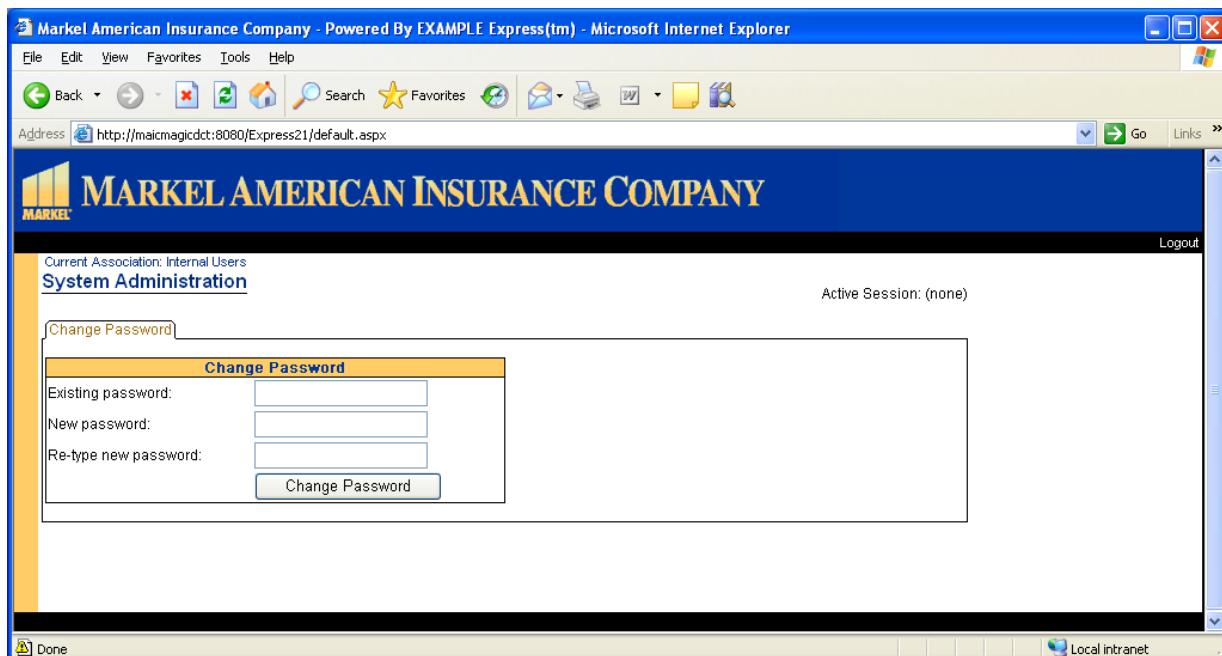
When you are finished with the message you may “close” the message, or click on the “X” to delete the message from your inbox (see the red circled area above).

PASSWORD

The first time a new user logs in and every 90 days after that, the password will expire. The following message will appear:



1. Click "OK". The Change Password Screen will appear as shown:



MARKEL AMERICAN INSURANCE COMPANY

Current Association: Internal Users
[System Administration](#)

Active Session: (none)

Change Password

Change Password

Existing password:

New password:

Re-type new password:

Change Password

2. Enter in your old password.
3. Determine what your new password will be based on the following rules:

- The password cannot contain the user's first name, last name or login
- It cannot contain spaces
- Must be at least 10 characters long
- 1 upper case, 1 lower case, one numeric and one special character must be included
- Cannot match the previous password

Ex. Badgers.2007

Alabama!99

HAPPY2cu2#

4. Enter in your new password following the guidelines above, and then enter in your new password again.
5. Click “Change Password”.
6. If the password change is complete you will receive the following message:



7. You may now proceed as normal.

If you do not have a User account and need to have one set up, please complete the “Request to Amend Established User” form found at the back of this manual. All requests for new users must be completed by the General Agent.

Please email the completed form to PTS@markelcorp.com or Fax: 262-547-9436.

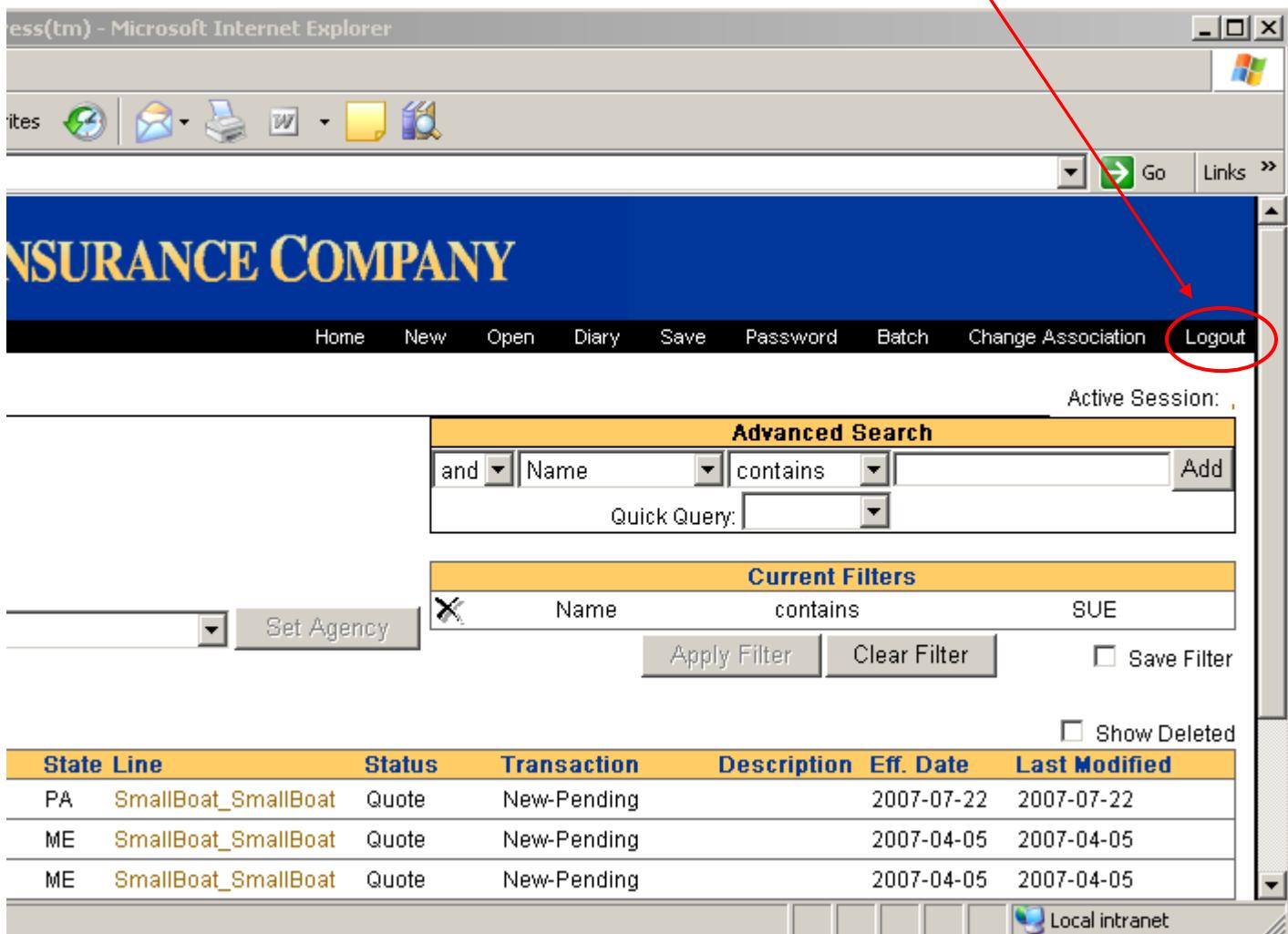
Once your user profile has been established, you will be emailed with a username and password to give you access to your account.

LOGOUT

Clicking on “Logout” will log you out of the system.

You will then need to close your internet browser session to be completely out of the system.

To close your internet browser session, click the red “X” in the upper right-hand corner.



PROCESSING A NEW QUOTE

GENERAL NOTES:

- Pay attention to the type of boat you are quoting and follow the appropriate procedures. Special procedures for certain boats are outlined in these instructions, especially on the [Boat Screen](#) and [Coverages Screen](#).
- To process a new quote in MAGIC, the user will go through a series of screens completing all fields with an asterisk (*) or as prompted by the system. Asterisked fields will be colored in yellow. To complete an issuance, the user will have to complete all the asterisked fields, as well as all the blue colored fields.
- Do not use the ampersand (&) symbol as it will cause an error.
- All quotes are good for 60 days. Once a quote expires you will see a Reset Quote Tab, unless the quote has been left in an approved status. If this occurs you will need to re-pend the quote to receive the reset quote button.
- Wherever there is a drop down box, you can repeatedly type the first letter of the word to find your selection or you may click the drop down arrow and scroll to your selection.
- It is not necessary to type the slashes and dashes in phone numbers, dates of birth, etc. Simply click the "Tab" key and the field will be automatically formatted.
- Cat capacity/bind restriction rules have been built into the system at the beginning of the quote process. You will receive a warning that quote can only be bound with a Wind Exclusion Endorsement or without hull coverage. You will be able to proceed to rating and will be able to either issue the policy with the exclusions OR choose to refer to company to remove the wind exclusion.
- You may use the **Next** button or **Back** button to click from page to page in order, or you may click on the appropriate tab that you need to go to. Click the **Save for Later** or **Exit** Buttons to save what you are doing and work on something else.

The screenshot shows a software interface for processing a new quote. The top navigation bar includes tabs for 'Boat', 'Coverages', 'Rating', 'Pricing', 'Print', and 'Help'. Below the tabs, the title 'Safety Equipment' is displayed. The form contains several checkboxes for selecting equipment features:

Equipment Type	Options
CO Detector	<input type="checkbox"/>
Fire Suppression	<input type="checkbox"/>
High Water Alarm	<input type="checkbox"/>
Sea Key	<input type="checkbox"/>
VHF	<input type="checkbox"/>
Depth Finder	<input type="checkbox"/>
EPIRB	<input type="checkbox"/>
GPS	<input type="checkbox"/>
Radar	<input type="checkbox"/>

At the bottom of the screen, there are several buttons: 'Save For Later' (disabled), 'Previous Boat' (disabled), 'Next Boat' (disabled), '< Back' (disabled), 'Next >', and a toolbar with icons for 'New', 'Open', 'Save', 'Print', and 'Exit'. The status bar at the bottom right shows 'Local intranet'.

Upon starting a quote a unique quote number will be assigned. At any time, the quote may be exited and retrieved later as the quote is automatically saved throughout the quoting process.

Depending on each user's authority, the quote process will vary slightly.

Sub-Producer:

- May only process a quote indication in the Markel Small Boat program. Markel High Performance and Markel Helmsman Yacht quotes will need to be processed by the GA.
- Must refer all quotes for approval.
- The GA approves the quote, issues the policy and applies the 1st payment (if applicable).
- The GA performs the policy maintenance.
- The sub-producer may apply subsequent payments and a renewal payment if a credit card is used as the form of payment.

Note: If the Sub-Producer works through the Markel Marine Service Center, the referral is sent to MAIC. MAIC then approves issues and performs all maintenance.

General Agent:

- If the risk is over their authority, the GA may only process an indication of premium. The risk must then be referred to MAIC for approval.
- If the risk is within their authority, the GA may process the quote, issue the policy, apply all payments and perform all maintenance.
- Any transaction outside the GA's Authority will be identified by the system and referral will be required.

MAIN SCREEN

To begin a new quote, click on “New”. This will take you to the first screen of the new quote process.

The screenshot shows the Microsoft Internet Explorer browser window for the Markel American Insurance Company. The title bar reads "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "https://maicmgcwebint1:8085/Express21/default.aspx". The page header includes the Markel logo and the company name "MARKEL AMERICAN INSURANCE COMPANY". The top menu bar has links for File, Edit, View, Favorites, Tools, and Help. Below the menu is a toolbar with icons for Back, Forward, Stop, Home, Search, Favorites, and Print. The main content area displays a form titled "New Quote Selection". It includes fields for "General Agent" (a dropdown menu showing "AMERICAN UNDERWRITING MGRS AGCY INC"), "Producer Name" (a dropdown menu showing "(Select Producer)"), "Producer Number" (a dropdown menu showing "+N/A"), and a "Find Producer" button. A note states "* indicates a required field". The form also contains sections for "Product/Program" (dropdown menu showing "(select) *"), "Effective Date" (text input showing "04-09-2007"), and "Location Zip Code" and "Location State" fields. The status bar at the bottom shows "Local intranet".

1. Select the Agency & Producer:

When you log in, your Agency will automatically be listed as the “General Agent”.

If there is a Producer you would select the Agency’s name from the drop down list located under “Producer Name”. Once you select the Agency from the list, their Producer Number will appear to the right.

If the Producer information is uncertain, click the “Find Producer” button. The following screen will appear:

Using the Find Producer feature, you are able to search by the Producer Name or the Producer Number. There must be a sub-producer selected in order to continue.

2. Select the “Product/Program”:

Select the appropriate Product/Program to quote from the drop down box.

SmallBoat_SmallBoat refers to Market Small Boat, HPBoat_HPBoat refers to Market High Performance and HYBoat_HYBoat refers to Market Helmsman Yacht.

Note: Selecting Market High Performance or Market Helmsman Yacht will produce additional fields. Refer below for more information.

3. Effective Date:

The Quote Effective date will default to today's date.

Note: The policy effective date can be set at time of issuance. Failure to have the correct effective date at issuance will require the policy to be canceled and re-issued.

4. Zip Code:

Enter the Zip Code of the location where the risk is moored. Hit “TAB” or click on the screen and the location state will populate

When the zip code is entered, the system will check to ensure that MAIC is accepting new business in that area at the current time. If not, the user will be notified accordingly.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites Address Go Links >

MARKEL AMERICAN INSURANCE COMPANY

New Quote Selection Current Association: AMERICAN UNDERWRITING MGRS AGCY INC

Main

1. Select the Agency and Producer * indicates a required field.

General Agent: * Producer Name: Producer Number: Find Producer

2. Select the Product and Program.

Product/Program: *

3. Select Effective Date.

Effective Date: 04-09-2007

4. Enter the Risk Location Zip Code and TAB out of field.

Location Zip Code: * Location State: MI

Done Local intranet

The system will also not allow the quote to continue if a zip code is entered in which your Agency is not licensed to do business with MAIC or if your Agency's current license for that state is not on file.

Markel High Performance and Markel Helmsman Yacht only:

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites Address Go Links >

Select the Agency and Producer

General Agent: * Producer Name: *

Select the Product and Program

Product/Program: *

Quote Effective Date
2/12/2008

Application Status
Renewal of current Markel American policy?

Enter the Risk Location ZIP Code and TAB out of field

Location ZIP Code: * Location State:

Select Mooring Location

Country: *

Clearance

NOTE: The risk will not be reserved for you until you generate a rate.

If the owner is or has had this boat insured with Markel within the last 30 days or has had it quoted with Markel by another producer within the last 60 days, you need to contact the Marine Team in order to proceed.

Personal or Corporate/ Trust Ownership? *

First Name: *
Last Name: *
Date of Birth: *
Year of Boat: *

Local intranet

5. Application Status (Markel High Performance and Markel Helmsman Yacht only):

If the policy is going to be a renewal of a current Markel American policy, select “Yes.”

6. Clearance (Markel High Performance and Markel Helmsman Yacht only):

Enter in your information to reserve the risk for 60 days. Be sure to fill out all required fields.

7. Mooring Location (Markel Helmsman Yacht only):

Select between Canada, Mexico and the U.S. as mooring countries.

If all required fields are acceptable, the “Start Quote” button will appear.

Click on “Start Quote” to proceed. You will be taken to the [Product Eligibility Screen](#).

PRODUCT ELIGIBILITY SCREEN – MARKEL SMALL BOAT ONLY

The [Product Eligibility Screen](#) contains 4 questions that are designed to either prevent the quote from continuing or alter the way the screens are displayed in the quoting process.

The screenshot shows a Microsoft Internet Explorer window with the following details:

- Title Bar:** Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer
- Menu Bar:** File, Edit, View, Favorites, Tools, Help
- Toolbar:** Back, Forward, Stop, Refresh, Home, Search, Favorites, Mail, Print, etc.
- Address Bar:** Address: http://corpwebuat30:8083/Express30/default.aspx
- Content Area:**
 - Logo:** MARKEL AMERICAN INSURANCE COMPANY
 - Navigation Links:** Home, New, Open, Diary, Save, Password, Batch, Change Association, Logout
 - Text:** MAIC SmallBoat WI (01.01) July, 2007 Current Association: MARKEL AMERICAN INSURANCE CO
 - Section Header:** (Quote - New-Pending)
 - Form Fields:** Origin Code (text box), Prospect ID (text box), Source Of Business (dropdown menu: (select)), Conversion Renewal (checkbox).
 - Questions:**
 - Will this boat be used for other than Private Pleasure? Yes No *
 - Is this boat titled in the name of a corporation or business? Yes No *
 - Is this unit Leased? Yes No *
 - Is this unit being held for Sale? Yes No *
 - Buttons:** Continue
- Status Bar:** Done, Local intranet

All of the radio buttons are currently defaulted to “No”. Please ensure that the questions are ultimately answered correctly based on the applicant’s information.

Answering “yes” to Question #1 will prevent the quote from continuing.

Answering “yes” to Question #2, will automatically change the [Owner Screen](#) to reflect questions to be answered by a Corporate representative.

Answering “yes” to Question #4 will deliver an error message that the risk is ineligible.

Once all 4 questions have been answered, click “Continue” to proceed to the [Special Notices Screen](#).

Conversion Renewal:

This button should only be used by the direction of MAIC. It is used when rolling a book of business to MAIC.

SPECIAL NOTICES SCREEN

The [Special Notices Screen](#) provides the applicable Fraud Warning as well as a disclosure regarding Insurance Score use.

NOTE: It is the responsibility of the agent to review this information with the applicant prior to starting a quote.

Both boxes need to be checked to confirm that the information displayed has been communicated to the applicant. When both boxes have been clicked a “Continue” button will appear.

Upon clicking “Continue” the user is attesting that this information was disclosed to the applicant and the user will proceed to the [Owner Screen](#).

The screenshot shows a Microsoft Internet Explorer window displaying the Markel American Insurance Company website. The title bar reads "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "https://maicmgcwebint1:8085/Express21/default.aspx". The main content area features the Markel logo and the text "MARKEL AMERICAN INSURANCE COMPANY". A banner at the top indicates "MAIC SmallBoat MI (00.01) Current Association: AMERICAN UNDERWRITING MGRS AGCY INC". Below the banner, there are links for "Home", "New", "Open", "Messages", "Save", "Password", and "Logout". On the left, a sidebar menu includes "Diary/Attachments" and "Special Notices". The "Special Notices" section is highlighted with a yellow border. It contains two sections: "Special Notices:" and "Fraud Warning:". The "Fraud Warning:" section contains a text box stating: "It is a crime to knowingly provide false, incomplete or misleading information to an insurance company for the purpose of defrauding the company. Penalties include imprisonment, fines, and denial of insurance benefits. Your state may have specific warnings against filing false claim information." Below this text box is a checkbox labeled "* I confirm compliance with Disclosure Requirements". The "Insurance Credit Score:" section contains a text box stating: "To offer an accurate quote in connection with this application for insurance, we will review the unit owner's credit report or obtain or use a credit-based insurance score based on the information contained in that credit report. We may use a third party in connection with the development of the unit owner's insurance score. Future reports may be used to update or renew insurance." Below this text box is another checkbox labeled "* I confirm compliance with Disclosure Requirements". At the bottom of the "Special Notices" section is a "Continue" button. A note at the bottom right of the page says "* indicates a required field."

Note: Sub-Producers who quote in MAGIC will see a 3rd disclosure notice reminding them that they are acting as a representative of the applicant, etc. (See screen shot that follows.)

Market American Insurance Company - Powered By EXAMPLE Express™ - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites

Address http://maicmagicdct:8080/Express21/default.aspx

Special Notices

* indicates a required field

Special Notices:

Fraud Warning:

It is a crime to knowingly provide false, incomplete or misleading information to an insurance company for the purpose of defrauding the company. Penalties include imprisonment, fines, and denial of insurance benefits. Your state may have specific warnings against filing false claim information.

*I confirm compliance with Disclosure Requirements

Insurance Credit Score:

To offer an accurate quote in connection with this application for insurance, we will review the unit owner's credit report or obtain or use a credit-based insurance score based on the information contained in that credit report. We may use a third party in connection with the development of the unit owner's insurance score. Future reports may be used to update or renew insurance.

*I confirm compliance with Disclosure Requirements

SubProducer Agreement

I recognize that I am acting on behalf of the applicant or policyholder as their broker and that I am not acting as the agent or broker for Market American Insurance Company (Markel). Moreover, I have specifically explained to the applicant or policyholder that I am acting on their behalf as their broker and that I am not the broker or agent for Markel. I recognize and agree that no implied or expressed authority has been granted to me by Markel or any of their representatives or employees. I recognize that this system is only a means to transfer information and any change or request that I make on this system is not to be construed as an acceptance by Markel of the change or request and that only Markel can make that decision and that it must be made expressly by Markel, in writing, in order of the change or request to be legally binding.

*I understand and agree to the terms herein.

Done

Sub-producers must check the box acknowledging the 3rd notice in order to proceed with processing the quote.

When all 3 boxes have been clicked a “Continue” button will appear.

Upon clicking “Continue” the user is attesting that this information was disclosed to the applicant and the user will proceed to the [Owner Screen](#).

OWNER SCREEN

The [Owner Screen](#) is designed to capture the required information regarding the owner(s) of the vessel. Accuracy of the information entered on this page is critical to ensure that an insurance score is able to be obtained.

Note: Be aware that screens for Markel High Performance Boats and Markel Helmsman Yachts will differ. Refer to addendums below.

Although it is not a requirement to obtain/enter the Social Security number of the owner, the Social Security number is the best means of securing the insurance score.

Reminder: The insurance score can have a favorable impact on the overall rate. Therefore, obtaining a Social Security number in the quote process can turn out to be very beneficial for the applicant.

If during the quoting process our Insurance Score provider is not accessible, no rate will be delivered and the quote will need to be re-processed later.

The screenshot shows a Microsoft Internet Explorer window with the title bar "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar contains the URL "http://corpwebuat30:8083/Express30/default.aspx". A status bar at the bottom right says "(Quote - New-Pending)".

The main content area displays a form titled "Owner Personal". At the top of the form is a navigation bar with tabs: "Owner Personal" (highlighted in blue), "Boat", "Operator", and "Assignment". Below the tabs is a link "Add Additional Owner".

The form fields are grouped under the heading "First Named Insured". Required fields are marked with an asterisk (*). The fields include:

- First Name
- Middle Initial
- Last Name
- Suffix (Select dropdown)
- Date of Birth
- SSN
- Primary Phone
- Secondary Phone
- Fax Number
- E-Mail Address
- Mailing ZIP
- Mailing Address 1
- Mailing Address 2
- City/County (Select dropdown)
- Mailing State

Below the form are two links: "Previous Owner" and "Next Owner". At the bottom of the form are two buttons: "Change Ownership Type" and "Save For Later".

The status bar at the bottom of the browser window includes "Done", "Local intranet", and other standard icons.

The address information entered here is considered to be the mailing address location. (The mooring location is captured during the issuance process.) If during the quoting process the insured's address is amended or the Social Security number is added the system will automatically re-pull the insurance score.

Add Additional Owner:

If there is more than one owner of the vessel, please click the "Add Additional Owner" button. Upon doing so, an additional set of fields to complete will display.

Adding a Spouse:

If there is a spouse that needs to be listed as an owner, add the spouse via the "Add Owner Information" button. Do not add a spouse's name with the first name of the first owner entered. (i.e. John & Sandy) Doing so will result in an insurance score not being found, and this could have a negative impact on the overall premium charged.

Corporate Ownership:

If the vessel is titled in a Corporate Name and this was indicated on the [Product Eligibility Screen](#), the [Owner Screen](#) will appear as shown below.

Change Ownership Type:

However, if Corporate ownership was not realized until later in the quoting process, selecting the "Change Ownership Type" button will change the screen from the Personal Ownership fields to the Corporate Ownership fields.

The screenshot shows a Microsoft Internet Explorer window displaying the 'MARKEL AMERICAN INSURANCE COMPANY' website. The title bar reads 'Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer'. The main content area is titled 'MAIC SmallBoat WI (01.01) July, 2007 Current Association: MARKEL AMERICAN INSURANCE CO'. A sub-header 'Diary/Attachments' and a status message '(Quote - New-Pending)' are visible. Below this, a navigation bar includes 'Home', 'New', 'Open', 'Diary', 'Save', 'Password', 'Batch', 'Change Association', and 'Logout'. A secondary navigation bar at the bottom of the page includes 'Owner Corporate', 'Boat', 'Operator', and 'Assignment'. A note '* Indicates a required field' is present. The main form is titled 'Owner' and contains the following fields: 'Corporation Name' (with an asterisk), 'Corporate Designee First Name' (with an asterisk), 'Corporate Designee Last Name' (with an asterisk), 'Primary Phone', 'Secondary Phone', 'Fax Number', 'E-Mail Address', 'Mailing ZIP' (with an asterisk), 'Mailing Address 1' (with an asterisk), 'Mailing Address 2', 'City/County' (with a dropdown menu and an asterisk), and 'Mailing State'. At the bottom of the form are buttons for 'Save for Later', 'Change Ownership Type', and 'Next >'. The status bar at the bottom right shows 'Local intranet'.

NOTE: On corporately titled risks an insurance score will not be obtained. Client entertainment is permitted, however, commercial use is not allowed.

Once all ownership information has been entered, click "Next" to proceed to the [Boat Screen](#). You may also change back to Personally owned, if required, by clicking the "Change Ownership Type" button again.

[Markel High Performance and Markel Helmsman Yacht:](#)

Markel High Performance and Markel Helmsman Yacht [Owner Screens](#) will have additional buttons and fields. (See below)

The screenshot displays a Microsoft Internet Explorer window with the title "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "http://corpwebuat30:8083/Express30/default.aspx". The main content area contains a form for entering owner information. A red box highlights the "Mailing State" section, which includes fields for "Is address provided same as residence street address?" and "Book Roll?". Below this section are buttons for "Validate Address", "Previous Owner", "Next Owner", "Change Ownership Type", "Exit", and "Next >". The browser interface shows standard Microsoft Internet Explorer controls at the top and bottom.

Address Same as Residence?:

Check this box if the mailing address given is the same as the owner's residence address.

Book Roll:

Check this box only if MAIC has approved book roll.

Validate Address:

This button brings up the Address Validation screen. It automatically validates the address that you entered on the screen previous against a USPS database, however, you can enter in a different address if you'd like.

The screenshot shows a Microsoft Internet Explorer window for 'Markel American Insurance Co - Powered By EXAMPLE Express(tm)'. The main page header is 'MARKEL AMERICAN INSURANCE COMPANY'. On the left, there's a sidebar with 'Owner Personal' and 'Add Addition' buttons, and fields for First Name, Middle Initial, Last Name, Suffix, Date of Birth, SSN, List Spouse, Primary Phone, and Secondary Phone. A central modal dialog box is open, titled 'MAIC HYBoat WI (00.01)'. It contains a 'Validate Address' button, a 'User Entered Address' section with fields for Address 1 ('111 E. WATER'), Address 2, City/County ('Appleton/Outagamie'), State ('WI'), and ZIP ('54911'). Below this is a 'Validated Address Information' section stating 'The address has been successfully validated.' and 'A validated match has been returned. Select Accept to keep the validated address.' It shows the validated address as '111 E WATER ST APPLETON, WI 54911-5796'. At the bottom of the dialog are 'Cancel', 'Validate', and 'Accept' buttons. The status bar at the bottom of the browser window shows 'Opx Opx 169' and 'Local intranet'.

BOAT SCREEN –MARKEL SMALL BOAT

In lieu of commenting on each field entered on the [Boat Screen – Markel Small Boat](#), only those fields that require special attention will be noted below. The two screen shots that follow provide a complete view of the [Boat Screen](#).

Note: This section pertains to Markel Small Boat ONLY. For Markel High Performance and Markel Helmsman Yacht, refer to their respective sections.

The screenshot shows a Microsoft Internet Explorer window with the title "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "http://corpwebuat30:8083/Express30/default.aspx". The main content area displays the "MARKEL AMERICAN INSURANCE COMPANY" logo and navigation links: Home, New, Open, Diary, Save, Password, Batch, Change Association, and Logout. A message at the top states "MAIC SmallBoat WI (01.01) July, 2007 Current Association: MARKEL AMERICAN INSURANCE CO". Below this, there are tabs for "Diary/Attachments" and "(Quote - New-Pending)". A sub-navigation bar includes "Owner Corporate", "Boat" (which is selected), "Operator", and "Assignment". A note indicates "* Indicates a required field". A "Add Boat" button is visible. The main form is titled "Enter Unit Information" and contains fields for Manufacturer, Hull Type, Hull Material, Propulsion, Length, Speed, Total Weight, and Calculated Speed. Below this is a section for "Engine(s)" with fields for Number Of Engines, Engine Manufacturer, Year, Horsepower, Model, and Type (Gasoline). At the bottom is a section for "Auxiliary Engine" with fields for Year, Make, Model, and Horsepower. A "Clear" button is also present. The status bar at the bottom right shows "Local intranet".

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites

Address Go Links >

Auxiliary Engine

Year	Make	Model	Horsepower
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Clear"/>			

Purchase Price * Purchase Date * (MM/YYYY) Total Value: Watercraft & Equipment w/ Engines *

Navigational Territory Distance: from Owner's Residence
 *

Please enter a valid zip code and select a city/county for this state.

Zip Code * Location City/County * State: WI

Safety Equipment

CO Detector <input type="checkbox"/>	Fire Suppression <input type="checkbox"/>	High Water Alarm <input type="checkbox"/>	Sea Key <input type="checkbox"/>	VHF <input type="checkbox"/>
Depth Finder <input type="checkbox"/>	EPIRB <input type="checkbox"/>	GPS <input type="checkbox"/>	Radar <input type="checkbox"/>	

[Previous Boat](#) | [Next Boat](#)

[« Back](#) [Next »](#)

Local intranet

Make Not Found:

Upon clicking "Make Not Found", the manufacturer field will become a field in which you may enter free form text. Please do not use the ampersand sign (&) when entering the manufacturer name. Doing so will cause an error, for example "C & J Marina" should be added as "C and J Marina" All vessels entered as "Make Not Found" will require referral for approval prior to binding.

Add Boat:

If there is more than 1 boat to be quoted, upon completing the [Boat Screen](#) for the first boat, click on "Add Boat". This will bring up a blank boat screen where the 2nd boat's information should be entered.

The "Add Boat" function can be used an infinite number of times.

If at any time you need to revert to the previous boat's information, click on "Previous Boat" (as shown below, circled in red).

MARKEL AMERICAN INSURANCE COMPANY

MAIC SmallBoat WI (01.01) July, 2007 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments , (Quote - New-Pending)

Owner Corporate **Boat** **Operator** **Assignment**

Add Boat

Boat 2 of 2

Enter Unit Information

Manufacturer: (select) * Make Not Found Year: _____ Model: _____

Hull Type: (select) * Hull Material: (select) * Propulsion: (select) *

Length: _____ * Speed: 0 * Total Weight: Boat & Engine: _____ Calculated Speed: 0

Engine(s)

Previous Boat | Next Boat



Done Local intranet

Delete Boat:

If more than one boat is entered, a "Delete" button will appear at the bottom of the screen.

Auxiliary Engine

Year: _____ Make: _____ Model: _____ Horsepower: _____ Clear

Purchase Price: _____ * Purchase Date: _____ * (MM/YYYY) Total Value: Watercraft & Equipment w/ Engines: _____ *

Navigational Territory: (select) * Distance: from Owner's Residence: _____ *

Please enter a valid zip code and select a city/county for this state.

Zip Code: 54911 * Location City/County: (select) * State: WI

Safety Equipment

CO Detector <input type="checkbox"/>	Fire Suppression <input type="checkbox"/>	High Water Alarm <input type="checkbox"/>	Sea Key <input type="checkbox"/>	VHF <input type="checkbox"/>
Depth Finder <input type="checkbox"/>	EPIRB <input type="checkbox"/>	GPS <input type="checkbox"/>	Radar <input type="checkbox"/>	

Delete

Save For Later

« Back | Next »

Previous Boat | Next Boat

Done Local intranet



Clicking “Delete” will delete the current page’s boat information. The delete function is not enabled if there is only one boat listed on the quote.

Once all boat information has been entered click “Next” to proceed to the [Operator Screen](#).

BOAT SCREEN – MARKEL HIGH PERFORMANCE

In lieu of commenting on each field entered on the [Boat Screen – Markel High Performance](#), only those fields that require special attention will be noted below. Yellow fields are required to be filled to obtain the quote; blue fields are required to be filled to bind the quote. The two screen shots that follow provide a complete view of the Boat Screen.

Note: This section pertains to Markel High Performance boats **ONLY**. For Markel Small Boats or Markel Helmsman Yacht, refer to their respective sections.

The screenshot shows a Microsoft Internet Explorer window displaying the 'Boat' tab of the 'Markel American Insurance Co - Powered By EXAMPLE Express(tm)' application. The page is titled 'Boat' and includes tabs for 'Owner Personal', 'Boat', 'Operator', 'Assignment', 'Loss Payee Info', and 'Coverage'. A note at the top right indicates that yellow fields are required for a quote and blue fields are required to bind the quote. The 'Boat' tab is active, showing the 'Add Boat' button and the 'Boat 1 of 1' header. The main form is divided into sections: 'Enter Unit Information', 'Engine(s)', and 'In Season Location'. The 'Enter Unit Information' section contains fields for Year (2000), Length (yellow *), Manufacturer (select), Make Not Found (checkbox), Model (yellow *), Hull Type (Traditional V), Hull Material (Fiberglass), Total Weight (yellow *), Speed (yellow *), and Hull ID # (HIN). The 'Engine(s)' section includes fields for # of Engines (2), Drive Type (I/O Sterndrive), Drive Description, Year (yellow *), Engine Manufacturer (yellow *), Total Horsepower (yellow *), and Type (Gasoline). The 'In Season Location' section includes fields for Location Type (select), Location Name (yellow *), Lay Up Type (None), Distance from Owner's Residence (yellow *), ZIP (yellow *), Address 1 (yellow *), Address 2, City/County (select), State (WI), and a 'Local intranet' link at the bottom right.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites

Address <http://corpwebuat30:8083/Express30/default.aspx> Go Links >

Purchase Price * Purchase Date * (MM/YYYY) Total Value: Watercraft & Equipment w/ Engines *

Navigation

Navigational Territory * Port Risk View Nav

Survey

Date Surveyed Surveyor Name

Safety Equipment

Propeller Hub Locks Auto Fire Extinguisher High Water Alarm Monitoring System
Trailer Ball or Axle Locks Outboard/Outdrive Locks Electronic Burglar Alarm Radar

Trailer

Add Trailer

Boat House

Add Boat House

Previous Boat | Next Boat

Exit

< Back Next >

Local intranet

Make Not Found:

Upon clicking “Make Not Found”, the manufacturer field will become a field in which you may enter free form text. Please do not use the ampersand sign (&) when entering the manufacturer name. Doing so will cause an error, for example “C & J Marina” should be added as “C and J Marina” All vessels entered as “Make Not Found” will require referral for approval prior to binding.

Speed Calculator:

Clicking "Speed Calculator" will bring up the Speed Calculator window.

The screenshot shows a Microsoft Internet Explorer window for Markel American Insurance Co. The main content area displays the "MAIC HPBoat WI (00.01)" page. A "Speed Calculator" section is highlighted, containing fields for "Horse Power" (200), "Weight (lbs)" (5500), and a "Constant" field. Below these, a "Calculated Speed:" section lists hull types and their corresponding constants: Heavy V bottom (225), Fast V bottom (250), Catamaran - Pleasure Type (275), and Fast Catamaran (300). At the bottom of the calculator section are "Return" and "Calculate Speed" buttons. To the right of the calculator, a sidebar shows a quote: "R B (Quote - New-Pending) QT00000009104 - HPBoat". The sidebar also includes links for "Password", "Batch", "Change Association", and "Logout". The bottom of the page features a "Previous Boat | Next Boat" link and a "Speed Calculator" button. The left sidebar includes tabs for "Owner Personal", "Boat" (which is selected), "Operator", and "Assignment". The "Boat" tab shows "Boat 1 of 1". The "Enter Unit Information" section includes fields for "Year" (2000), "Length" (20), and "Manufacturer". The "Engines(s)" section shows "0px 0px 279".

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Favorites Search

Address http://corpwebuat30:8083/Express30/default.aspx Go Links »

Enter Unit Information

Year	Length	Manufacturer	Make Not Found	Model
2000	* 20	* Adrenaline	<input type="checkbox"/>	12
				Speed Calculator

Hull Type Hull Material Total Weight: Boat & Engine Speed Hull ID # (HIN)

Other	* Fiberglass	2000	*	
-------	--------------	------	---	--

Engine(s)

# of Engines	2	Drive Type	I/O Sterndrive	* Drive Description
Year		Engine Manufacturer		Total Horsepower

Type Gasoline * Clear

In Season Location

Location Type	Location Name	Lay Up Type
Commercial Storage	*	None
Distance from Owner's Residence		

Done Local intranet

Drive Type:

Enter the type of drive used by the boat engine(s). If further explanation is required, enter the information in the Drive Description field.

Total Horsepower:

Enter the combined horsepower of all engines on the boat.

Clear:

Pressing the “Clear” button will clear all the fields in the Engine section, as well as set all drop down lists to their default setting.

Lay Up Type:

Selecting a value other than “None” from the drop down list will cause more fields to be displayed. (Outlined in red) Fill in the appropriate values for the new fields.

In Season Location

Location Type	Location Name
Place of Business	* IDOL INC *
Distance from Owner's Residence	20 *
ZIP	32408 *
Address 1	123 FIRST STREET *
Address 2	
City/County	Panama City Beach/Bay *
State	FL

Lay Up Type	From (MM/DD)	To (MM/DD)
On Lift		
LocationType	Location Name	
(select)	*	
ZIP	*	

Purchase Price 95000 * **Purchase Date** 05-2006 * (MM/YYYY) **Total Value: Watercraft & Equipment w/ Engines** 95000 *

Navigation

Navigational Territory	Coastal Off-Shore	Port Risk
GM- Key West to Brownsville Limit:	up to 25 *	(Select) View Nav

Done Local intranet

Survey

Date Surveyed	Surveyor Name
---------------	---------------

Safety Equipment

Propeller Hub Locks	<input type="checkbox"/>	Auto Fire Extinguisher	<input type="checkbox"/>	High Water Alarm	<input type="checkbox"/>	Monitoring System	<input type="checkbox"/>
Trailer Ball or Axle Locks	<input type="checkbox"/>	Outboard/Outdrive Locks	<input type="checkbox"/>	Electronic Burglar Alarm	<input type="checkbox"/>	Radar	<input type="checkbox"/>

Trailer

Add Trailer

Boat House

Add Boat House

Done Local intranet

Add Trailer:

Clicking the "Add Trailer" button brings up additional fields. (Outlined in red)

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites Address Go Links >

Safety Equipment

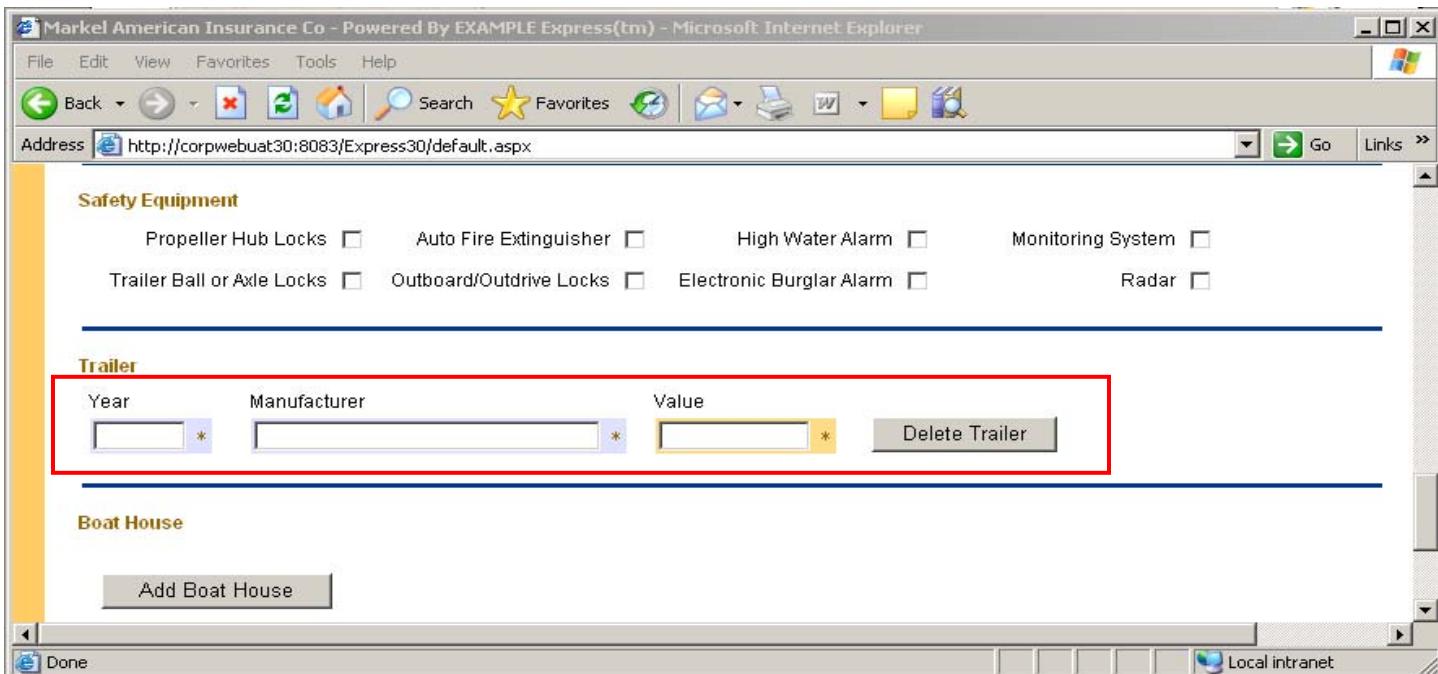
Propeller Hub Locks Auto Fire Extinguisher High Water Alarm Monitoring System
Trailer Ball or Axle Locks Outboard/Outdrive Locks Electronic Burglar Alarm Radar

Trailer

Year	Manufacturer	Value
<input type="text"/> *	<input type="text"/> *	<input type="text"/> *

Boat House

Done Local intranet



Enter the Year, Manufacturer Name and Value of the trailer.

Add Boathouse:

Clicking the “Add Boathouse” button will also bring up additional fields (in green on the following image). Enter the description of the boat house, along with the value and its ZIP code. Click “Delete Boat House” to collapse the fields.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites Address Go Links >

Boat House

Description of Boat House Value
 * *

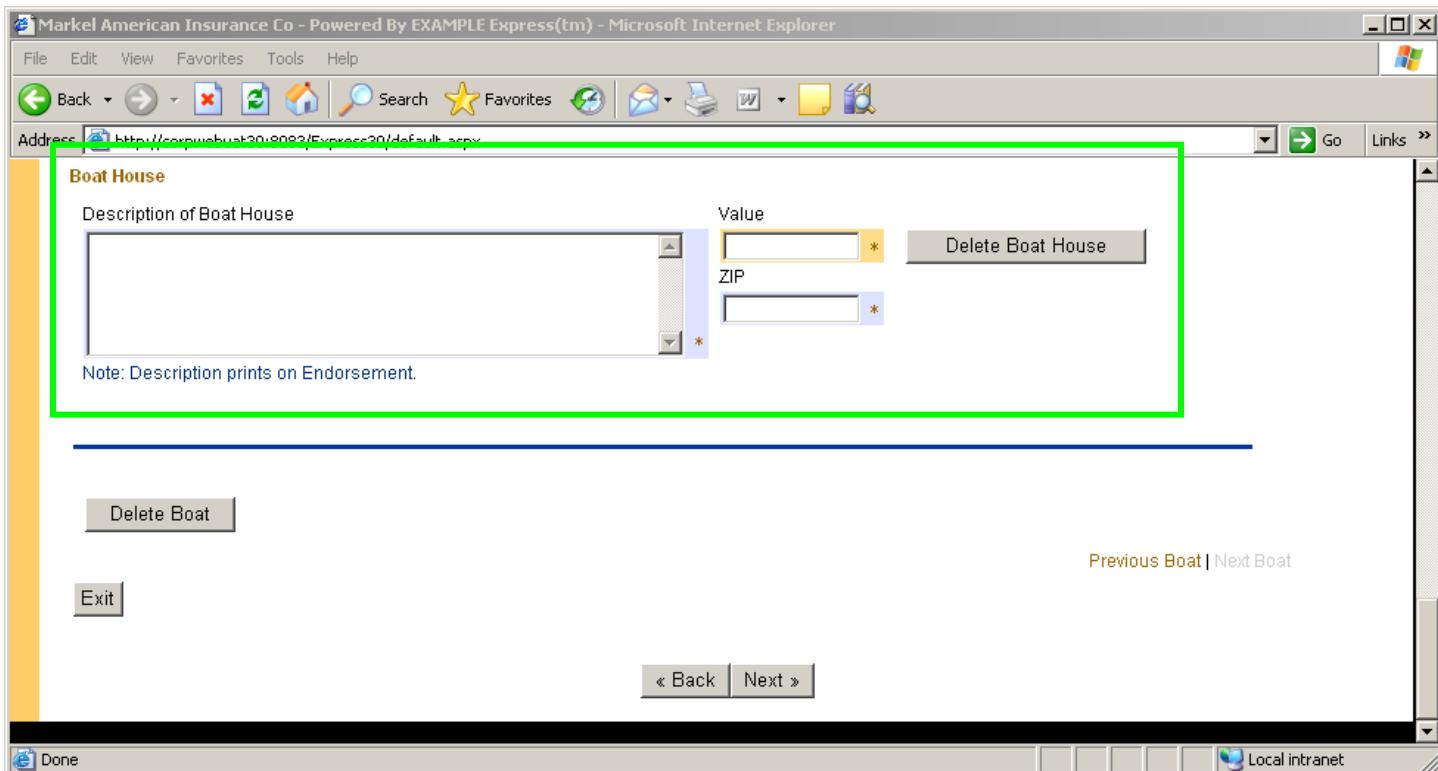
ZIP *

Note: Description prints on Endorsement.

Previous Boat | Next Boat

« Back Next »

Done Local intranet



Add Boat:

If there is more than 1 boat to be quoted, upon completing the boat screen for the first boat, click on "Add Boat" (circled in green below). This will bring up a blank boat screen where the 2nd boat's information should be entered.

The "Add Boat" function can be used an infinite number of times.

If at any time you need to revert to the previous boat's information, click on "Previous Boat" (as shown below, circled in red).

The screenshot shows a Microsoft Internet Explorer window with the title bar "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "http://corpwebuat30:8083/Express30/default.aspx". The menu bar includes File, Edit, View, Favorites, Tools, and Help. Below the menu is a toolbar with Back, Forward, Stop, Refresh, Home, Search, Favorites, and other icons. The main content area has tabs: Owner Personal, Boat (which is selected and highlighted in orange), Operator, Assignment, Loss Payee Info, and Coverage. A note "* Indicates a required field" is visible. On the left, a vertical yellow bar indicates "Boat 2 of 2". In the center, under "Enter Unit Information", there are fields for Year, Length, Manufacturer, Make Not Found, Model, Hull Type, Hull Material, Total Weight, Speed, and Hull ID # (HIN). Below this, under "Engine(s)", there are fields for # of Engines (set to 2), Drive Type (I/O Sterndrive), Drive Description, Year, Engine Manufacturer, Total Horsepower, and Type. At the bottom, there are "Done" and "Local intranet" buttons. Two specific elements are circled: the "Add Boat" button on the left is circled in green, and the "Previous Boat" link on the right is circled in red.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Address <http://corpwebuat30:8083/Express30/default.aspx> Go Links >

Safety Equipment

Propeller Hub Locks Auto Fire Extinguisher High Water Alarm Monitoring System
Trailer Ball or Axle Locks Outboard/Outdrive Locks Electronic Burglar Alarm Radar

Trailer

Boat House

Delete Boat

Previous Boat | Next Boat

Back Next

Local intranet

Clicking “Delete Boat” will delete the current page’s boat information. The delete function is not enabled if there is only one boat listed on the quote.

Once all boat information has been entered click “Next” to proceed to the [Operator Screen](#).

BOAT SCREEN – MARKEL HELMSMAN YACHT

In lieu of commenting on each field entered on the [Boat Screen – Markel Helmsman Yacht](#), only those fields that require special attention will be noted below. Yellow fields are required to be filled to obtain the quote; blue fields are required to be filled to bind the quote. The two screen shots that follow provide a complete view of the [Boat Screen](#).

Note: This section pertains to boats **Markel Helmsman Yacht ONLY**. For **Markel Small Boat** or **Markel High Performance**, refer to their respective sections.

The screenshot shows a Microsoft Internet Explorer window displaying the 'Boat' tab of the 'Markel American Insurance Co - Powered By EXAMPLE Express(tm)' application. The page title is 'Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer'. The address bar shows the URL <http://corpwebuat30:8083/Express30/default.aspx>. The menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar includes Back, Forward, Stop, Home, Search, Favorites, and other standard browser icons. The main content area has tabs at the top: Owner Personal, **Boat** (selected), Operator, Loss Payee Info, and Coverage. A note at the top right indicates that fields marked with an asterisk (*) are required. Below the tabs, there is a button labeled 'Add Boat' and links for 'Previous Boat' and 'Next Boat'. The main form is divided into sections: 'Enter Unit Information', 'Engine(s)', and 'In Season Location'. The 'Enter Unit Information' section contains fields for Year (2000), Length, Manufacturer (select), Make Not Found, Model, Yacht Name, Hull Type (Cruiser/ Express Cruiser), Hull Material (Fiberglass), Speed, Hull ID # (HIN), and a Speed Calculator button. The 'Engine(s)' section contains fields for # of Engines (2), Drive Type (Inboard/V- Drive), Year, Engine Manufacturer, Total Horsepower, Type (Diesel), and a Clear button. The 'In Season Location' section contains fields for Location Type (select), Location Name, Lay Up Type (None), Distance from Owner's Residence, ZIP (54911), Address 1, Address 2, City/County (select), and State (WI). All required fields are highlighted with yellow borders and contain an asterisk (*).

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites Go Links

Address

Purchase Price * Purchase Date * Total Value: Hull w/ Engines *

Navigation and Usage

Navigational Territory (select) * View Nav

Boat Usage Port Risk
Captained Charter Limited * (Select)

Survey

Date Surveyed Survey Condition (select)

Surveyor Name Survey Type (select)

Safety Equipment

CO Detector <input type="checkbox"/>	Depth Finder <input type="checkbox"/>	EPIRB <input type="checkbox"/>	Fire Suppression <input type="checkbox"/>
GPS <input type="checkbox"/>	High Water Alarm <input type="checkbox"/>	Monitoring System <input type="checkbox"/>	Radar <input type="checkbox"/>
VHF <input type="checkbox"/>	Weatherfax <input type="checkbox"/>		

Trailer

Add Trailer

Boat House

Add Boat House

PWC

Number Of PWCs
 Add PWC Info

Tender

Add Tender

Make Not Found:

Upon clicking “Make Not Found”, the manufacturer field will become a field in which you may enter free form text. Please do not use the ampersand sign (&) when entering the manufacturer name. Doing so will cause an error, for example “C & J Marina” should be added as “C and J Marina”

Speed Calculator:

Clicking “Speed Calculator” will bring up the Speed Calculator window.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Favorites Go Links

Address http://corpwebuat30:8083/Express30/default.aspx

MARKEL AMERICAN INSURANCE COMPANY

MAIC HYBoat WI (00.01) Current Association:

Owner Personal **Boat** Operator Loss Payee

Rating Messages
Boat page - Risk 2000 : to quote you must fill out all required fields indicated in blue.

Add Boat

Boat 1 of 1

Enter Unit Information

Year	Length	Manufacturer
2000	* 27	*

Yacht Name

Hull Type Hull Material Speed Hull ID # (HIN)

* * * 10 * *

Speed Calculator

Enter the values to Calculate the Speed.

Horse Power
Weight (lbs)
Constant

Calculated Speed:

Hull Type Constant
Heavy V bottom 225
Fast V bottom 250
Catamaran - Pleasure Type 275
Fast Catamaran 300

Return Calculate Speed

AMERICAN UNDEF

password Batch Change Association Logout

Local intranet

Enter the Horse Power, Weight and the appropriate constant listed. Click "Calculate Speed" for an accurate speed estimate. Click return to close the window.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://corpwebuat30:8083/Express30/default.aspx> Go Links

Enter Unit Information

Year	Length	Manufacturer	Make Not Found	Model
2000 *	27 *	(select)	<input type="checkbox"/>	<input type="text"/>

Yacht Name

Hull Type Hull Material Speed Hull ID # (HIN)

Other	Wood	<input type="text"/> *	<input type="text"/> *
-------	------	------------------------	------------------------

Engine(s)

# of Engines	4	Drive Type	Jet	*
Year	Engine Manufacturer	Total Horsepower	Type	
<input type="text"/> *	<input type="text"/> *	<input type="text"/> *	Other	* <input type="button" value="Clear"/>

Local intranet

Clear:

Pressing the “Clear” button will clear all the fields in the Engine section, as well as set all drop down lists to their default setting.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://corpwebuat30:8083/Express30/default.aspx> Go Links

Safety Equipment

CO Detector	<input type="checkbox"/>	Depth Finder	<input type="checkbox"/>	EPIRB	<input type="checkbox"/>	Fire Suppression	<input type="checkbox"/>
GPS	<input type="checkbox"/>	High Water Alarm	<input type="checkbox"/>	Monitoring System	<input type="checkbox"/>	Radar	<input type="checkbox"/>
VHF	<input type="checkbox"/>	Weatherfax	<input type="checkbox"/>				

Trailer

Boat House

Local intranet

Add Trailer:

Clicking the “Add Trailer” button brings up additional fields. (Outlined in red below)

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites Home Go Links

Address http://corpwebuat30:8083/Express30/default.aspx

Trailer

Year	Manufacturer	Value	Delete Trailer
<input type="text"/> *	<input type="text"/> *	<input type="text"/> *	<input type="button"/>

Boat House

Add Boat House

Done Local intranet

Enter the Year, Manufacturer Name and Value of the trailer. If you clicked the “Add Trailer” button in error, click on “Delete Trailer” to hide the fields again.

Add Boathouse:

Clicking the “Add Boathouse” button will also bring up additional fields (in green on the following image). Enter the description of the boat house, along with the value and its ZIP code. Click “Delete Boat House” to collapse the fields.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites Home Go Links

Address http://corpwebuat30:8083/Express30/default.aspx

Boat House

Description of Boat House	Value	Delete Boat House
<input type="text"/>	<input type="text"/> *	<input type="button"/>
ZIP	<input type="text"/> *	
54911 *		

Note: Description prints on endorsement.

Done Local intranet

Add PWC Info:

Select the number of PWC's associated with the yacht. Click the “Add PWC Info” button up to four times to add additional information about each PWC.

Add Tender:

Click the “Add Tender” button to add a description of any tender craft that is associated with the yacht.

The screenshot shows a Microsoft Internet Explorer window titled "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "http://corpwebuat30:8083/Express30/default.aspx". The main content area has two sections: "PWC" and "Tender".

PWC section:

- Number Of PWCs: A dropdown menu set to 0.
- Add PWC Info button.
- A table with columns: Year, Manufacturer, Hull ID # (HIN), and Value. The Value column contains the text "ACV".
- Delete PWC button.

Tender section:

- Add Tender button.
- Description input field.
- Delete Tender button.

Add Boat:

If there is more than 1 boat to be quoted, upon completing the boat screen for the first boat, click on “Add Boat” (circled in green). This will bring up a blank boat screen where the 2nd boat’s information should be entered.

The “Add Boat” function can be used an infinite number of times. If at any time you need to revert to the previous boat’s information, click on “Previous Boat” (as shown below, circled in red).

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites Address http://corpwebuat30:8083/Express30/default.aspx Go Links >

Owner Personal **Boat** Operator Loss Payee Info Coverage

* Indicates a required field

Add Boat (circled in green)

Boat 2 of 2

Enter Unit Information

Year	Length	Manufacturer	Make Not Found	Model
1850 *	<input type="text"/>	(select)	<input type="checkbox"/>	<input type="text"/>

Yacht Name

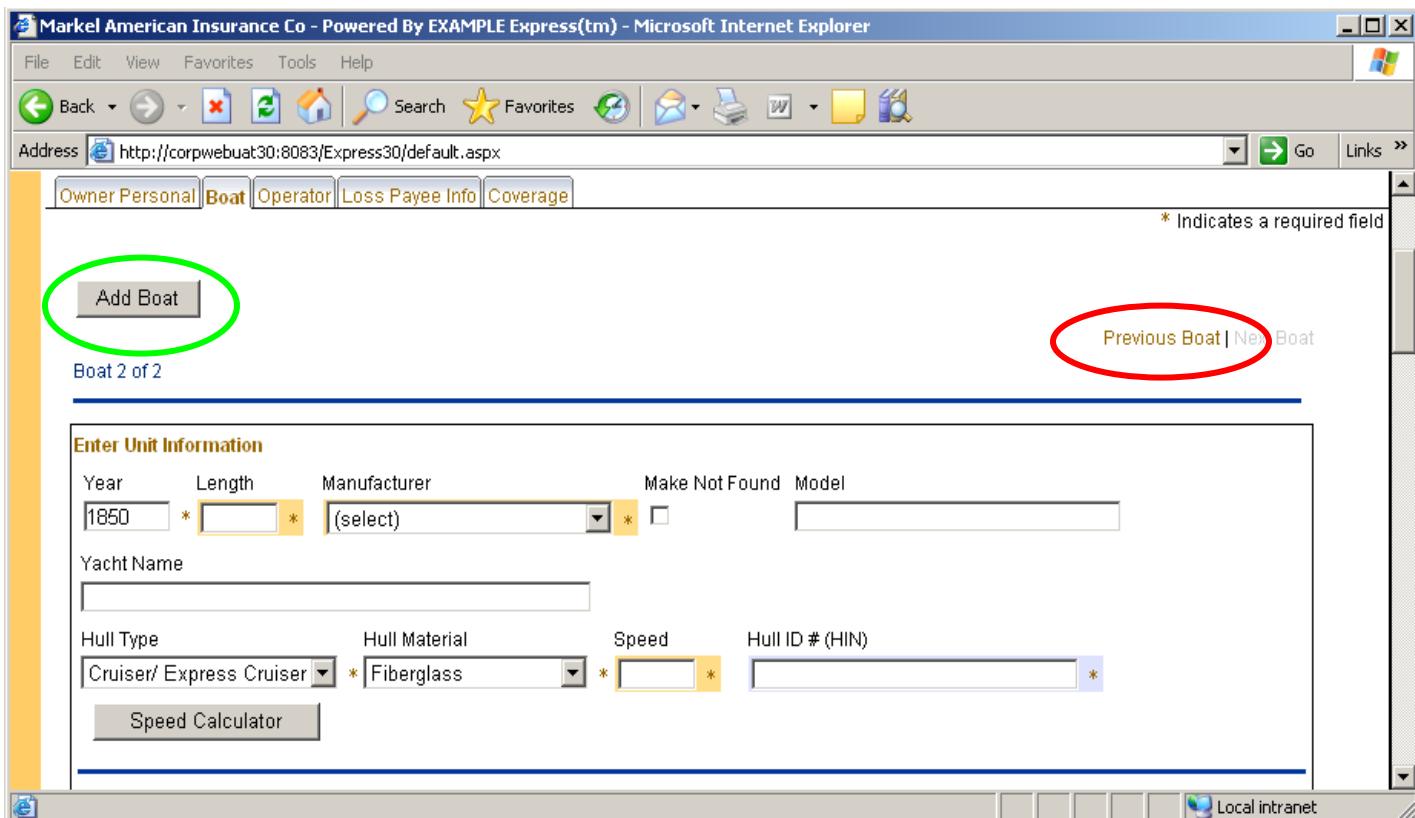
Hull Type Hull Material Speed Hull ID # (HIN)

Cruiser/ Express Cruiser	Fiberglass	<input type="text"/>	<input type="text"/>
--------------------------	------------	----------------------	----------------------

Speed Calculator

Previous Boat | Next Boat

Local intranet



Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites Address http://corpwebuat30:8083/Express30/default.aspx Go Links >

PWC

Number Of PWCs 0

Add PWC Info

Tender

Add Tender

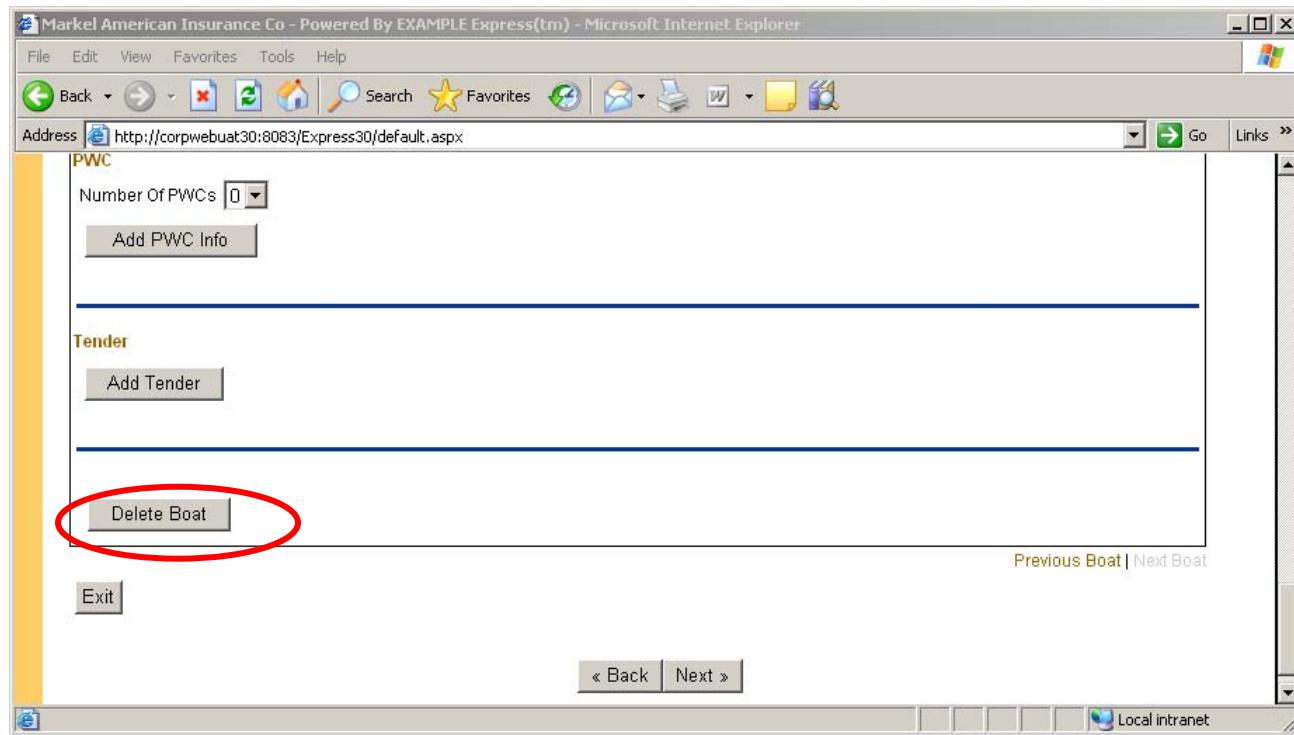
Delete Boat (circled in red)

Previous Boat | Next Boat

Exit

<< Back Next >>

Local intranet



Clicking "Delete Boat" will delete the current page's boat information. The delete function is not enabled if there is only one boat listed on the quote.

Once all boat information has been entered click "Next" to proceed to the [Operator Screen](#).

OPERATOR SCREEN

If the first owner entered on the quote is the Primary Operator, click "Yes". This will populate the Owner information previously captured. If the first owner is not the primary operator, an Additional Operator will need to be added. To add an additional operator, click the "Add Operator" button. This can be done as many times as necessary.

Operators may be deleted by pressing the "Delete" button. However, the delete option is not available if there is only 1 operator listed on the policy.

Note: Be aware that screens for Markel High Performance Boats and Markel Helmsman Yachts will differ. Refer to addendums below.

Motor Vehicle Record:

If an operator has violations on their motor vehicle record, they are to be entered in this field.

The screenshot shows a Microsoft Internet Explorer window displaying the Markel American Insurance Company website. The title bar reads "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "http://corpwebuat30:8083/Express30/default.aspx". The main header features the Markel logo and the text "MARKEL AMERICAN INSURANCE COMPANY". Below the header, a navigation menu includes "Home", "New", "Open", "Diary", "Save", "Password", "Batch", "Change Association", and "Logout". A sub-menu for "MAIC SmallBoat WI (01.01) July, 2007 Current Association: MARKEL AMERICAN INSURANCE CO" is visible. The user is identified as "RYAN BENNETT (Quote - New-Pending) QT00000009134". A toolbar at the top includes standard icons for Back, Forward, Stop, Home, Search, Favorites, and File operations. The main content area contains tabs for "Owner Personal", "Boat", "Operator" (which is selected), and "Assignment". A sub-header "Add Operator" is present. A note indicates "* Indicates a required field". The "Operator" tab section asks if the operator is the primary operator (radio buttons for Yes or No, Yes is selected). It also includes fields for First Name (RYAN), Middle Initial (empty), Last Name (BENNETT), Date of Birth (4/4/1984), and Years of Experience (5). Below these fields are questions about recent motor vehicle violations and marine losses, both answered "No". A section titled "Motor Vehicle Violations/At Fault Accidents" contains a table with a single row. The table has columns for "Description" (dropdown menu showing "Speeding 0-9 Over"), "Date (MM/YYYY)" (text input "11-2007"), and "Used In Rating" (checkbox checked). A "Delete" button is also present. A red box highlights this entire "Motor Vehicle Violations/At Fault Accidents" section.

Marine Losses:

For each operator, marine loss information is required. If the operator has not had any losses, no further action is required. However, if the answer is "Yes", the system will require that the losses are entered. (See area outlined in red below.)

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://corpwebuat30:8083/Express30/default.aspx

Marine Losses

Add Marine Loss

Loss Type Description Used In Rating

Storm (Wind/Hail/Snow/Lightning//Flooding) * HURRICANE Delete

Date 02-2005 * (MM/YYYY) Amount \$ 2000 *

Operator Experience

Add Experience

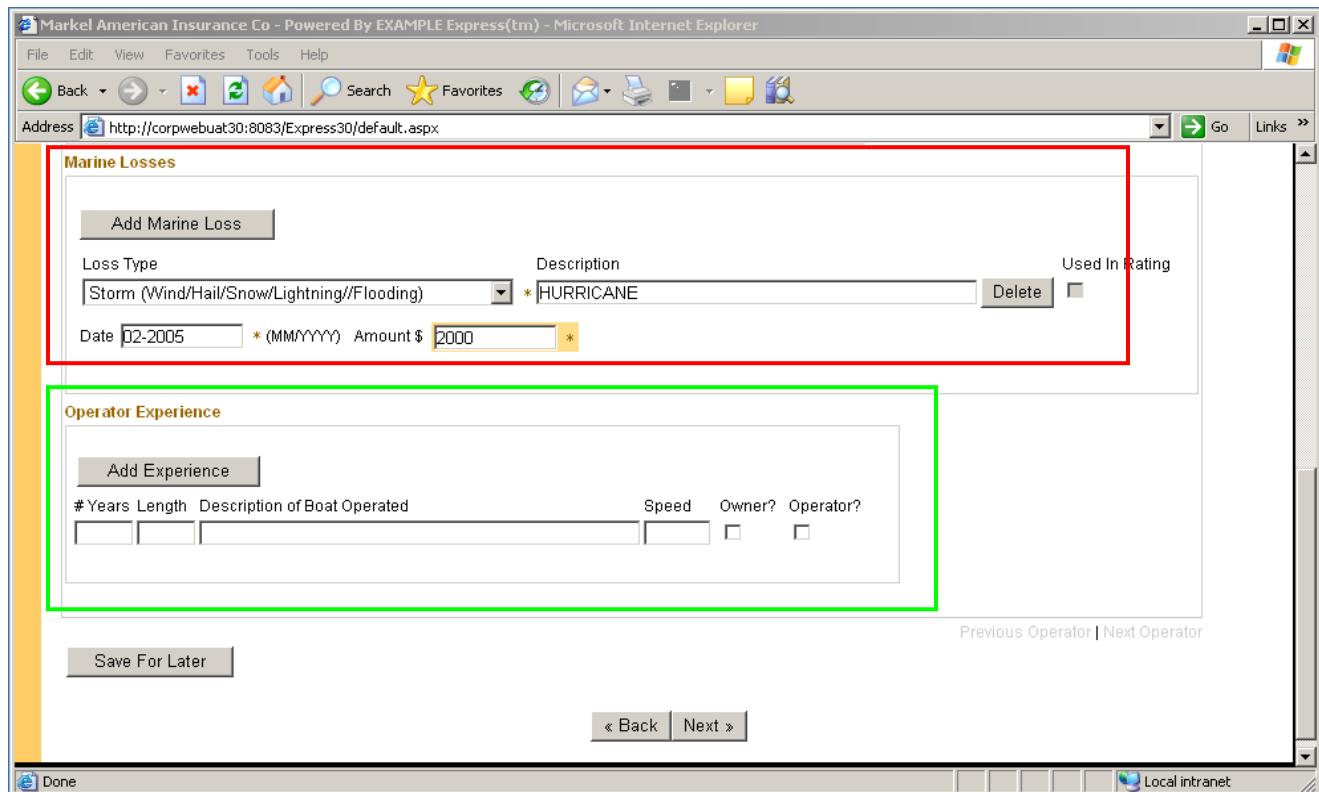
Years Length Description of Boat Operated Speed Owner? Operator?

Save For Later

« Back | Next »

Previous Operator | Next Operator

Done Local intranet



Markel High Performance and Markel Helmsman Yacht [Operator Screens](#) will have additional fields.

Markel High Performance Operator Screen:

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://corpwebuat30:8083/Express30/default.aspx Go Links > * Indicates a required field

Add Operator

Operator 1 of 1 Previous Operator | Next Operator

If the following operator is not the primary operator, please enter the primary operator's information here.

First Name	Middle Initial	Last Name	Date Of Birth	Driver's License #	Driver's License State
<input type="text" value="R"/> *	<input type="text"/>	<input type="text" value="B"/> *	<input type="text" value="4/4/1975"/> *	<input type="text"/>	<input type="button" value="(select)"/>

Operator Experience

Operator Experience must be greater than zero.

Add Experience

# Years	Length	Description of Boat Operated	Speed	Owner?	Operator?
<input type="text"/> *	<input type="text"/> *	<input type="text"/>	<input type="text"/>	<input type="radio"/> No <input type="radio"/> Yes	<input type="radio"/> No <input type="radio"/> Yes

Has this Operator had any motor vehicle violations or at fault accidents in the last three years? No Yes *

Has this Operator had any marine losses? No Yes *

Occupation:
 Married: No Yes
 Homeowner: No Yes

Safety Courses:
 Tres Martin's Performance Boat School
 Brian Ross' Learn the Ropes

Named Operator Assignment

Named Operator assignment is required for each boat. All operators must be named operators and at least 25 years old. Check all units that apply.

Assigned?	Year	Boat	Speed
<input type="checkbox"/>	2000	0	

Markel Helmsman Yacht Operator Screen:

The screenshot shows a Microsoft Internet Explorer window displaying the 'Add Operator' screen for the Markel American Insurance Co. The window title is 'Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer'. The address bar shows the URL: http://corpwebuat30:8083/Express30/default.aspx.

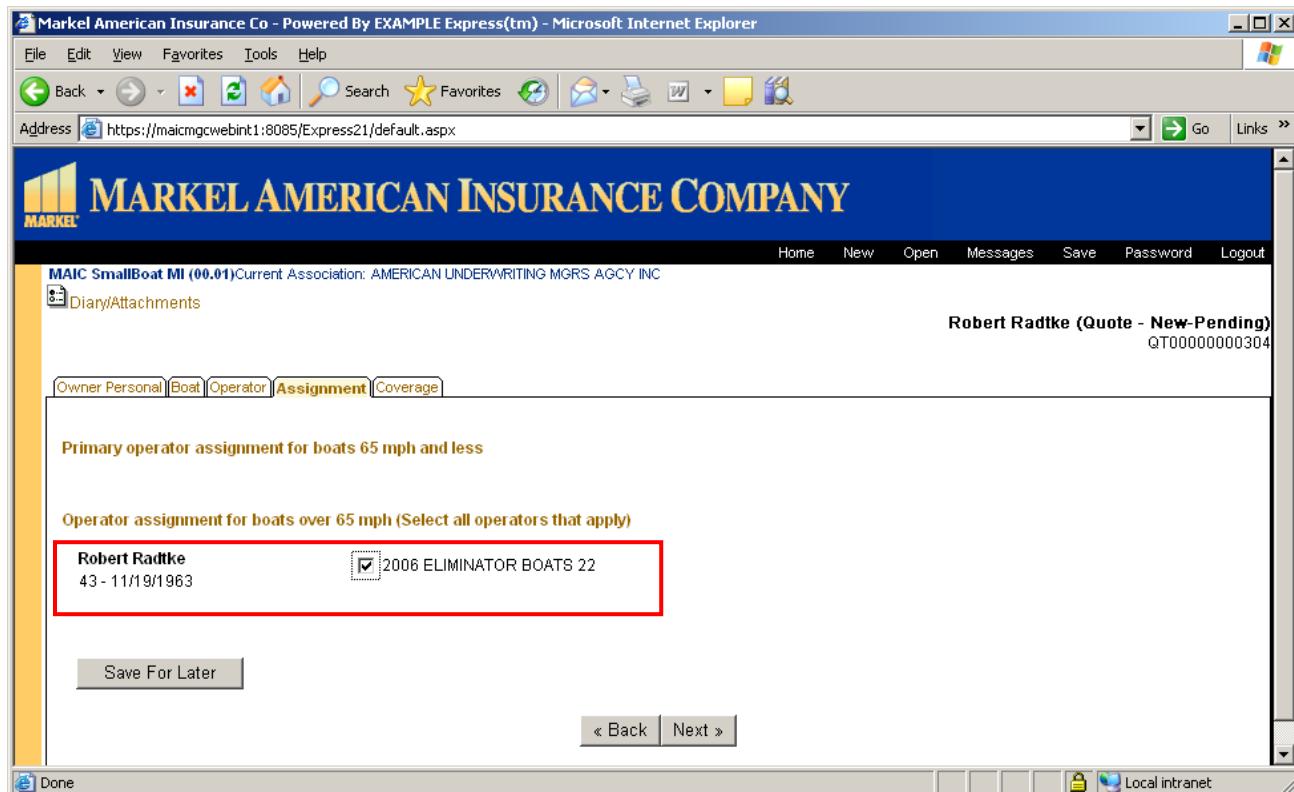
The main content area contains the following sections:

- Add Operator**: A button at the top left.
- Operator 1 of 1**: A section header.
- Personal Information**: Fields for First Name (R), Middle Initial (), Last Name (B), Date Of Birth (4/4/1975), and Licensed Captain (checkbox).
- Operator Experience**: A section header. It includes a note that 'Operator Experience must be greater than zero' and a 'Add Experience' button. Below it are fields for # Years (1), Length (10), Description of Boat Operated (text input), Speed (text input), Owner? (radio buttons: No, Yes), and Operator? (radio buttons: No, Yes).
- Marine Losses**: A section header with the question 'Has this Operator had any marine losses?' and radio buttons for 'No' and 'Yes'.
- Occupation and Safety Courses**: A section outlined in blue. It contains fields for Occupation (text input), Married (radio buttons: No, Yes), Homeowner (radio buttons: No, Yes), and Safety Courses (text input).
- Navigation**: Buttons for 'Previous Operator' and 'Next Operator' at the top right, and 'Exit' and navigation links ('« Back', 'Next »') at the bottom.
- System Status**: Icons for 'Done' and 'Local intranet' at the bottom right.

Occupation and Safety Courses:

These fields (outlined in blue on both screenshots) allow you to enter in additional information pertaining to an operator's occupation, and any additional safety courses taken.

ASSIGNMENT SCREEN



To assign an operator--click on the box that correlates the operator to the specific vessel that they intend to operate. (See area outlined in red above.) Doing the latter will make that operator a named operator for that particular vessel and the operator's name will then print on the declarations page for that vessel.

LOSS PAYEE INFO (MARKEL HIGH PERFORMANCE/MARKEL HELMSMAN YACHT ONLY)

Markel High Performance boats, as well as Markel Helmsman Yachts may require the agent to add a Loss Payee if applicable. To enter, Click on the “Add Loss Payee” button.

The screenshot shows a Microsoft Internet Explorer window with the title bar "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar contains "http://corpwebuat30:8083/Express30/default.aspx". The main content area displays the "MARKEL AMERICAN INSURANCE COMPANY" logo. Below it, the text "MAIC HPBoat WI (00.01) Current Association: MARKEL AMERICAN INSURANCE CO" and "R B (Quote - New-Pending) QT00000009133 - HPBoat AMERICAN UNDERWRITING MGRS - AMERICAN UNDERWRITING MGRS". A navigation menu at the top includes Home, New, Open, Diary, Save, Password, Batch, Change Association, and Logout. Below the menu, tabs for Owner Personal, Boat, Operator, Assignment, Loss Payee Info (which is selected and highlighted in blue), and Coverage are visible. Under the "Loss Payee Info" tab, two boat entries are listed: "2000 Challenger Offshore" and "1999 Activator", each with an "Add Loss Payee" button. A "Exit" button is also present. A note at the bottom states: "Note: Risk must have watercraft and equipment coverage in order to add Loss Payee." Navigation buttons "« Back" and "Next »" are at the bottom right. The status bar at the bottom right shows "Local intranet".

This will bring up fields for entering in the Payee's information. All fields in blue must be filled out to bind the quote. Validate Address works the same as on the [Owner Screen](#).

If the Loss Payee is the same for multiple boats, use the copy and paste button to enter the information more quickly.

The screenshot shows the same browser window with the "Loss Payee Info" tab selected. For the "2000 Challenger Offshore" entry, there are input fields for Name, ZIP, Address 1, Address 2, City/County (with a dropdown menu), and State. To the right of these fields are "Copy" and "Paste" buttons. Below the input fields are "Delete" and "Validate Address" buttons. The "1999 Activator" entry is shown below with its own "Add Loss Payee" button. The "Exit" button and the "Note: Risk must have watercraft and equipment coverage in order to add Loss Payee." message are also present. Navigation buttons "« Back" and "Next »" are at the bottom right. The status bar at the bottom right shows "Local intranet".

COVERAGE SCREEN

Upon completion of the required quote information, the [Coverage Screen](#) will appear. The [Coverage Screen](#) displays the following:

Annual Premium:

The total unit premium, not including any taxes.

Unit Fees/Taxes:

Any taxes/fees that apply to the unit.

Policy Taxes/Fees:

Any applicable taxes/fees on the policy.

Total Annual Premium:

The total premium plus any applicable taxes.

Coverages Table:

Lists all applicable coverages for the unit, along with the limit, deductible and premium.

Market American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites

Address http://corpwebuat30:8083/Express30/default.aspx Go Links

MARKEL AMERICAN INSURANCE COMPANY

MAIC SmallBoat OR (01.01) July, 2007 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

JOSH FOSTER (Quote - New-Pending)
QT000000008354

Owner Personal Boat Operator Assignment Coverage Submission

* Indicates a required field

Quote is NOT legal until policy has been bound

Financial Responsibility Level I

Annual Premium:	Unit Fees/Taxes:	Policy Fees/Taxes:	Total Annual Premium:
\$772.00	\$0.00	\$0.00	\$772.00

Rate Print View Payment Schedules Save For Later

Prev Page | Next Page

2007 CENTURION ESCALADE

Coverages:

	Limit	Deductible	Premium
Watercraft & Equipment	42000	1% * \$597	\$420
No Coverage desired			
Settlement Type	Agreed Value		
Watercraft Liability	\$300,000 *		\$135
No Liability desired			
Uninsured Boater	\$300,000		incl.
Medical Payments	\$1,000		incl.
Pollution	\$500,000		incl.
Personal Effects	\$1,000	\$250	incl.

Local intranet

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Print Copy Paste Cut Find Links

Address http://corpwebuat30:8083/Express30/default.aspx Go Links

Towing	\$500	incl.	
Trailer	\$4,000	\$250	\$40
Fishing	(select)		\$0
Boat Lift	(select)		\$0
Boating Experience (+/- 5%)	<input type="text" value="0"/>		
Unit Premium			\$772
Rated Operator	JOSH FOSTER		

Endorsements:
Diminishing Deductible

Prev Page | Next Page

Annual Premium: \$772.00	Unit Fees/Taxes: \$0.00	Policy Fees/Taxes: \$0.00	Total Annual Premium: \$772.00
-----------------------------	----------------------------	------------------------------	-----------------------------------

Rate View Payment Schedules

« Back

Done Local intranet

When Boat Lift Coverage is added to the policy, the Boat Lift Coverage Endorsement will appear in the endorsement box on the [Coverage screen](#).

Unit Premium:

The total premium for all of the coverages (not including any applicable taxes)

Endorsements for Markel Small Boat:

All mandatory endorsements will apply to the quote automatically and will be in a “read only” format. Various endorsements are available to add to the policy manually.

To add an endorsement, click on the drop down list and select the endorsement that you wish to add. Then click the “Add” button.

Once an optional endorsement is added, a “Delete” button will appear, so the endorsement can be deleted at a later date as well. In the screen print that follows, the Double Deductible Endorsement was added, notice the “Delete” button to the right of the endorsement.

Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://maicmagicdct:8080/Express21/default.aspx

No Liability desired	<input type="checkbox"/>	
Uninsured Boater	\$500,000	incl.
Medical Payments	\$1,000	incl.
Pollution	\$500,000	incl.
Personal Effects	\$1,000	\$250 incl.
Towing	\$500	incl.
Trailer	(select)	\$0
Fishing	(select)	\$0
Boat Lift	(select)	\$0
Unit Premium		\$646
Rated Operator		Lisa Testing

Endorsements:

- Actual Cash Value
- Diminishing Deductible
- Double Deductible For Theft
- (Select)

Prev Page | Next Page

Annual Premium:	Unit Fees/Taxes:	Policy Fees/Taxes:	Total Annual Premium:
\$646.00	\$0.00	\$0.00	\$646.00

Rate Print View Payment Schedules Save For Later

< Back Next >

Done Local intranet

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://corpwebuat30:8083/Express30/default.aspx

MARKELEAN INSURANCE COMPANY

MAIC HYBoat WI (00.01) Current Association: MARKELEAN INSURANCE CO

Diary/Attachments TEST TEST (Quote - New-Pending)
OT00000008982 - HYBoat
AMERICAN UNDERWRITING MGRS - AMERICAN UNDERWRITING MGRS

Owner Personal Boat Operator Loss Payee Info Coverage Submission * Indicates a required field

The owner information entered resulted in a NO HIT. Please verify the information and correct if necessary.

Annual Premium:	Unit Fees/Taxes:	Policy Fees/Taxes:	Total Annual Premium:
\$862.00	\$0.00	\$0.00	\$862.00

Endorsements Rate View Payment Schedules Exit

Prev Page | Next Page
2006 FORMULA

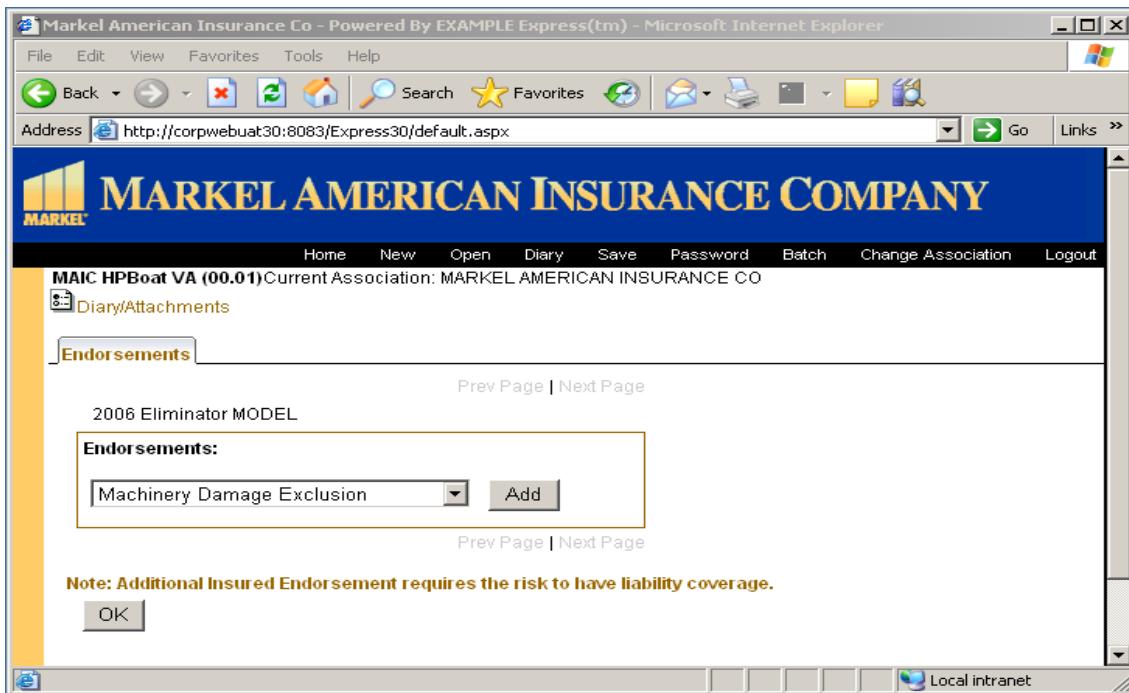
Coverages:
No Hull Coverage
Hull
PWC Hull ACV
Settlement Type

Limit	% Ded	\$ Ded	Premium
150000	2%	* \$3,000	\$669
	N/A		\$0

Done Local intranet

Endorsements Button – Markel High Performance and Markel Helmsman Yacht:

Both Markel High Performance and Markel Helmsman Yacht [Coverage Screens](#) contain the Endorsements Button. Clicking on the Endorsements Button brings up the [Endorsements Screen](#). (See screenshot below)



Depending on the type of endorsement selected, additional information may be required to be entered. In order to complete an endorsement, click the Add button after filling out any asterisked fields (if necessary.)

Rate:

There is a “Rate” button at the top and the bottom of the [Coverage Screen](#).

Click the “Rate” button to rate the coverages you have selected. We recommend getting in the habit of clicking “Rate” prior to clicking “Print” to generate the quote sheet.

View Payment Schedules:

This will allow you to look at the available payment plans based on the premium quoted. The [Installment Calculator Screen](#) will display. Clicking “OK” will take you back to the [Coverage Screen](#).

The screenshot shows a Microsoft Internet Explorer window with the title "Market American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "https://maicmgcwebint1:8085/Express21/default.aspx". A modal dialog box titled "Market American Insurance Company - Powered By EXAMPLE Express(tm)" is open, specifically the "MAIC SmallBoat KY (00.01)" tab. The dialog box contains a section titled "Installment Calculator" with four tabs: "Full Pay", "Two Installments", "Three Installments", and "Six Installments". The "Two Installments" tab is selected and displays the following table:

Bill Date	Installment Fee	Installment Amount	Premium	Taxes and Fees
02-08-2007	\$0.00	\$355.88	\$325.00	\$30.88
04-09-2007	\$5.00	\$198.38	\$162.50	\$30.88

Below this table, there are three more tables for "Three Installments", "Four Installments", and "Six Installments", each with similar columns: Bill Date, Installment Fee, Installment Amount, Premium, and Taxes and Fees. At the bottom left of the dialog box, there are two buttons: "Rate" and "Print".

Print:

Clicking "Print" will prepare the quote sheet (and an application, if applicable) as a PDF file that can be printed and emailed. The quote sheet will contain all of the pertinent notices and disclosures. The PDF becomes part of the quote.

Upon clicking print, a box will appear that allows you to enter notes that will print on the quote sheet. If you wish to enter notes, do so, and then click "Print".

Note: It is advisable to always use the print feature to print a quote, in lieu of just printing the page from your web browser. The PDF file that is generated contains important notices and disclosures that need to be shared with the applicant.

Once all Coverages and Limits have been chosen, you can either Exit the quote by clicking "Save for Later" or click "Next". Clicking "Next" will take you to the [Submission Screen](#).

JUDGMENTS SCREEN (MARKEL HIGH PERFORMANCE/MARKEL HELMSMAN YACHT)

Judgments:

Clicking on the “Judgments” button (circled in red below) in the [Covrances Screen](#) will bring you to the [Judgment Screen](#).

The screenshot shows a Microsoft Internet Explorer window displaying the Covrances Screen for the Markel High Performance/Markel Helmsman Yacht. The 'Judgments' button is highlighted with a red circle.

Covrances Screen (Markel High Performance/Markel Helmsman Yacht)

Boat Lift: \$0, 2%, \$0, \$0
Trailer: \$0, 2%, \$0, \$0
Boat House: \$0, 2%, \$0, \$0
Endorsement Premium: \$0
Unit Premium: \$6,500
Rated Operator: DOROTHY GOODWIN

Judgments (button circled in red)

Optional Endorsements

- Total Loss Valuation
- Trip

Hull rate per \$100: \$4.040

Prev Page | Next Page

Annual Premium: \$6,500.00	Unit Fees/Taxes: \$0.00	Policy Fees/Taxes: \$0.00	Total Annual Premium: \$6,500.00
-------------------------------	----------------------------	------------------------------	-------------------------------------

Endorsements | Rate | View Payment Schedules | Exit

« Back | Next »

Markel High Performance Judgment Screen:

The screenshot shows a Microsoft Internet Explorer window displaying the 'Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer' page. The URL is <http://corpwebuat30:8083/Express30/default.aspx>. The main content area is titled 'MAIC HPBoat VA (00.01)' and contains a 'Judgment' form. The form includes sections for 'W & E' and 'Liability' with various categories like Navigation, Owner/Operator, Boat Characteristics, and Other. A 'Comments' section with a scroll bar is present. At the bottom right of the form are 'Cancel' and 'OK' buttons. The left sidebar shows policy details: 'MAIC HP', 'Diary', 'Owner', 'Annual', 'Coverage', 'No Vessel Equipment', 'Watercraft', 'Settlement', and 'No Loss'. The bottom status bar shows 'Opx Opx 46' and 'Local intranet'.

MAIC HPBoat VA (00.01)

Judgment

	W & E	Liability	Comments
Navigation	<input type="text"/>	<input type="text"/> %	<input type="text"/>
Owner/Operator	<input type="text"/>	<input type="text"/> %	<input type="text"/>
Boat Characteristics	<input type="text"/>	<input type="text"/> %	<input type="text"/>
Other - Explain below	<input type="text"/>	<input type="text"/> %	<input type="text"/>
Total	0	0 %	0 %

% Commission Reduction (Applies to all units on this policy.)

Comments:

Cancel OK

Coverage
No Vessel Equipment
Watercraft
Settlement
No Loss

Watercraft Liability * \$2,020

Fill in the fields with the appropriate values. If a value is entered into a W & E or Liability Field, it will be mandatory for the user to enter a comment. Click OK when finished. Any judgments entered will cause the quote to be referred.

Markel Helmsman Yacht Judgment Screen:

The screenshot shows a Microsoft Internet Explorer window displaying a form titled "MAIC HYBoat WI (00.01)". The form is for entering judgments related to a yacht. It includes sections for "Navigation", "Owner/Operator", "Yacht Characteristics", and "Other - Explain below". Each section has two input fields: "HULL" and "P&I", followed by a "Comments" text area. A "Total" row provides summary values. Below the form is a note about commission reduction. At the bottom right are "Cancel" and "OK" buttons. The left sidebar shows navigation links like "Diary", "Owner", "The o...", "Annual", "Cove", "No H...", "Hull", and "PV". The right sidebar displays a message about new pending items and required fields.

	HULL	P&I	Comments
Navigation	<input type="text"/>	<input type="text"/> %	<input type="text"/>
Owner/Operator	<input type="text"/>	<input type="text"/> %	<input type="text"/>
Yacht Characteristics	<input type="text"/>	<input type="text"/> %	<input type="text"/>
Other - Explain below	<input type="text"/>	<input type="text"/> %	<input type="text"/>
Total	0	%	0 %

% Commission Reduction (Applies to all units on this policy.)

Comments:

Cancel OK

Fill in the fields with the appropriate values. If a value is entered into a HULL or P&I field, it will be mandatory for the user to enter a comment. Click OK when finished. Any judgments entered will cause the quote to be referred.

SUBMISSION

Once on the [Submission Screen](#), you can Exit (which saves the quote for later), Complete the Quote, Refer it, Move Agency or go back to make any desired changes.

Billing Instructions

Select the appropriate value from the drop down menu. Choices are “Bill Insured” or “Bill Other.” If the bill is to go to someone other than the insured, select “Bill Other.”

Exit:

If the quote is done being processed and no further action is required at that time, click “Exit”. The quote can then be retrieved to work on again at a different time.

Move Agency:

If you accidentally chose the incorrect sub-producer when starting your quote, you will be able to reassign to the correct sub-producer by using the Move Agency button. This option will also be available on the last screen in the complete issuance process. This button is only available for agents or internal users.

Refer:

If the quote is processed but requires approval for some reason, click the “Refer” button.

The screenshot shows a Microsoft Internet Explorer window displaying the 'Market American Insurance Co - Powered By EXAMPLE Express(™) - Microsoft Internet Explorer' page. The address bar shows 'http://corpwebuat30:8083/Express30/default.aspx'. The page title is 'RYAN BENNETT (Quote - New-Pending) Q100000009175 - HPBoat'. The main content area has tabs: 'Owner Personal', 'Boat', 'Operator', 'Assignment', 'Loss Payee Info', 'Coverage', and 'Submission'. The 'Submission' tab is active. Below the tabs, there is information: 'Name: RYAN BENNETT' and 'Previous Policy Number: N/A'. A 'Premiums' section shows: 'Total Annual Premium: \$1,652.00', 'Total Written: \$1,652.00', 'Prior Total Annual: \$0.00', and 'Written Change: \$1,652.00'. Under 'Billing Instructions', a dropdown menu is set to 'Bill Insured'. The 'Billing Information' section contains: Name: RYAN BENNETT, ZIP: 54901-4757, Address 1: 512 ALGOMA BLVD APT 302, Address 2: , City/County: Oshkosh/Winnebago, State: WI. At the bottom, there is a 'Available Actions' row with buttons: Print, Refer (which is circled in red), Move Agency, Complete Quote, and Exit. Below the buttons is a '< Back' link. The status bar at the bottom right says 'Local intranet'.

Note: The “Refer” button will always display, even when a referral is not required. Please pay attention to the rating messages to confirm whether a referral is required or not.

You may also refer at any time that you would simply like a second opinion on a risk.

*For more information on referrals
see the section that follows re Referring a Risk for Approval.*

Complete Quote:

If you would like to Issue the quote or Complete the remaining information, click the “Complete Quote” button. On the Markel High Performance and Markel Helmsman Yacht screens, if information is missing, the tabs that require additional information will turn red and the missing data will be communicated through messages on top of the screen. (See screenshot below) To continue issuing the quote, go back to the tabs in red and fill in the missing information.

The screenshot shows a Microsoft Internet Explorer window displaying a quote completion page for Markel American Insurance Co. The address bar shows the URL: <http://corpwebuat30:8083/Express30/default.aspx>. The page has a navigation bar with links for Back, Forward, Stop, Refresh, Home, Search, Favorites, and Help. Below the navigation bar is a toolbar with icons for Print, Copy, Paste, Find, Select All, Undo, Redo, and other standard browser functions. The main content area contains several tabs at the top: Owner Personal, Boat, Operator, Assignment, Loss Payee Info, and Coverage. The 'Boat' tab is highlighted with a red oval. A note to the right of the tabs states: "* Indicates a required field". Below the tabs, there is a section titled "Rating Messages" with instructions for operators and boats. It also mentions that policy effective dates cannot be prior to 2/9/2008 12:00:00 AM or later than 4/14/2008 12:00:00 AM. The form includes fields for Name (RYAN BENNETT), Previous Policy Number (N/A), and Effective Date (a yellow input field marked with an asterisk). A "Premiums" section shows total annual premiums (\$0.00), total written amounts (\$1,652.00), prior total annual amounts (\$0.00), and written changes (\$1,652.00). The "Billing Instructions" section includes a dropdown menu for "Bill Insured". The "Billing Information" section lists the insured's details: Name (RYAN BENNETT), ZIP (54901-4757), Address 1 (512 ALGOMA BLVD APT 302), Address 2 (empty), City/County (Oshkosh/Winnebago), and State (WI). The "Available Actions" section provides links for Print, Move Agency, and Exit. At the bottom of the page is a "« Back" link and a toolbar with icons for Print, Copy, Paste, Find, Select All, Undo, Redo, and other standard browser functions. The status bar at the bottom right shows "Local intranet".

Markel Small Boat Screen:

Diary/Attachments

JOY RIDER (Quote - New-Pending)
QT00000009634

Owner Personal Boat Operator Assignment Coverage Issue Operator Info Risk Location Additional Interest Info

* Indicates a required field

Mailing Address Confirmation

Mailing Address

Owner Name	JOY RIDER
Mailing ZIP	61108 *
Mailing Address 1	1 MARINA WAY *
Mailing Address 2	
City/County	Rockford/Winnebago *
Mailing State	IL
E-Mail Address	
Primary Phone	262-548-9880 *
Secondary Phone	
Fax#	

Driver's License Information

Operator Name	Drivers License Number	License State
JOY RIDER		(select) *

Save For Later

< Back **Next >**



Upon clicking "Complete Quote" for a Markel Small Boat with no missing information, three new Tabs will appear: [Issue Operator Info Screen](#), [Risk Location Screen](#) and the [Additional Interest Info Screen](#).

ISSUE OPERATOR INFO – MARKEL SMALL BOAT ONLY

On the [Issue Operator Info Screen](#), you will verify the mailing address information as well as complete the driver's license information for all operators.

Owner name:

This will auto populate from the [Owner Personal Screen](#).

Mailing Address/City and Zip code:

This information will also auto populate from the [Owner Personal Screen](#).

Primary Phone:

The phone number including the area code must be entered.

Operator name:

This will auto populate from the [Assignment Screen](#). If there is more than one operator, all of the names will automatically populate.

Drivers License Number/License State:

These are mandatory fields and must be entered (for each operator listed).

MAIC SmallBoat IL (01.01) July,2007 Current Association: MARKEL AMERICAN INSURANCE CO
[Diary/Attachments](#)

JOY RIDER (Quote - New-Pending)
GT00000009634

[Owner Personal](#) [Boat](#) [Operator](#) [Assignment](#) [Coverage](#) [Issue Operator Info](#) [Risk Location](#) [Additional Interest Info](#) [Submission](#)

* Indicates a required field

Mailing Address Confirmation

Mailing Address

Owner Name	JOY RIDER
Mailing ZIP	<input type="text" value="61108"/> *
Mailing Address 1	<input type="text" value="1 MARINA WAY"/> *
Mailing Address 2	<input type="text"/>
City/County	<input type="text" value="Rockford/Winnebago"/> *
Mailing State	IL
E-Mail Address	<input type="text"/>
Primary Phone	<input type="text" value="262-548-9880"/> *
Secondary Phone	<input type="text"/>
Fax #	<input type="text"/>

Driver's License Information

Operator Name	Drivers License Number	License State
JOY RIDER	<input type="text" value="DRIVERS LICENSE"/> *	<input type="text" value="MS"/> *

[Save For Later](#)

[« Back](#) [Next »](#)

The “Next” button will take you to the [Risk Location Screen](#).

RISK LOCATION – MARKEL SMALL BOAT ONLY

On the [Risk Location Screen](#) you will enter the additional required information regarding the boat, motor, trailer if applicable), and the location of the vessel.

The screenshot shows a Microsoft Internet Explorer window displaying the 'Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer' page. The address bar shows 'http://maicmagicdct:8080/Express21/default.aspx'. The title bar indicates 'MAC SmallBoat AL (01.01) Current Association: MARKEL AMERICAN INSURANCE CO'. The top menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar contains Back, Forward, Stop, Home, Search, Favorites, and other standard icons. The main content area has tabs at the top: Owner Personal, Boat, Operator, Assignment, Coverage, Issue Operator Info, Risk Location, Additional Interest Info, and Submission. The 'Risk Location' tab is selected. A sub-header 'test quote (Quote - New-Pending)' with ID 'QT00000005298' is visible. Below the tabs, a note says '* indicates a required field.' The form fields include:

- Select Risk: A dropdown menu showing '2007 BAYLINER'.
- Unit Information**:
 - Hull Serial #: A text input field labeled 'hullserial number' with an asterisk (*) indicating it is required.
 - Engine 1 Serial #: An empty text input field.
- Risk Location**:
 - Is this Boat kept at the same location Out Of Season? Yes No *
- In Season**:
 - Zip Code: 35201
 - Address 1: 123 Test Rd *
 - Address 2: An empty text input field.
 - City/County: Birmingham/Jefferson
 - State: AL
 - Facility Type: A dropdown menu showing 'Residence'.
 - Facility Name: An empty text input field.
- Buttons: 'Save For Later', '<< Back', 'Next >', and 'Done'.

Select Risk:

The Unit description will auto populate in the drop-down box from the [Boat Screen](#). If there is more than one unit, after entry of unit 1 information, the user must select any additional units from the drop down box and enter the information for the additional unit(s).

Unit Information:

The required unit information includes the Hull ID number, engine serial number(s) depending on the type of propulsion, and trailer information if trailer coverage was selected.

Trailer Information:

If trailer coverage is selected on the [Coverage Screen](#), the [Risk Location Screen](#) will have fields to capture the trailer manufacturer, model and serial number. See screen shot below.

Market American Insurance Company - Powered By EXAMPLE Express™ - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://maimagicdct:8080/Express21/default.aspx

stena hansen (Quote - New - returning)
QT00000000069

Owner Personal | Boat | Operator | Assignment | Coverage | Issue Operator Info | Risk Location | Additional Interest Info

* indicates a required field.

Save For Later

Must enter a Hull Serial Number for every boat

Must enter Information for every boat.

Select Risk: 2004 AQUASPORT 120

Unit Information

Hull Serial # *

Engine 1 Serial #

Trailer Information

Make * Year * Serial Number *

*** Warning - Trailer coverage is limited to \$500 without a serial number. ***

*** Please enter the serial number or click "Reset Coverage" button to change Trailer Coverage Limit. ***

Reset Coverage

Pick Location

Is this Boat kept at the same location Out Of Season? Yes No *

In Season

Zip Code 33037

Done Local intranet

Risk Location:

If the unit is kept at the same location out of season, select “Yes”. The city, state, and zip code will auto populate from the location section on the boat screen. You will be required to enter the Address where it is kept in the **Address 1** field.

If the boat is not kept in the same location out of season, select “No”. If you select “No”, an additional set of fields will appear for you to enter the “Out of Season” location.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites Go Links

Address https://maicmgcwebint1:8085/Express21/default.aspx Go Links

Diary/Attachments

Robert Radtke (Quote - New-Pending)
QT000000000304

Owner Personal Boat Operator Assignment Coverage Issue Operator Info Risk Location Additional Interest Info

* indicates a required field.

Must enter Information for every boat.

Select Risk:

Unit Information

Hull Serial # *

Engine 1 Serial # *

Risk Location

Is this Boat kept at the same location Out Of Season? Yes No *

In Season	Out of Season
Zip Code 49935	Zip Code 49915 *
Address 1 434 W. Hagerman Lake Road	Address 1 16 E. 1st St. *
Address 2	Address 2
City/County Iron River/Iron	City/County Caspian/Iron *
State: MI	State MI
Facility Type Residence *	Facility Type Place Of Business *
Facility Name	Facility Name

Local intranet

Facility Type:

Select from the drop down box what type of facility the unit is kept. This field is mandatory.

The "Next" Button will take you to the [Additional Interest Screen](#).

ADDITIONAL INTEREST INFO – MARKEL SMALL BOAT ONLY

1. If you need to add a Lienholder and/or an Additional Interest, select the unit from the drop down box that you are adding a Lienholder/Additional Interest to.

Note: **Lienholder fields do not display until the policy is in the complete issuance phase for Markel Small Boat.**

The screenshot shows a Microsoft Internet Explorer window with the title bar "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "http://corpwebuat30:8083/Express30/default.aspx". The main content area displays the "MARKEL AMERICAN INSURANCE COMPANY" logo. Below it, a navigation menu includes "Home", "New", "Open", "Diary", "Save", "Password", "Batch", "Change Association", and "Logout". A sub-menu for "MAIC SmallBoat MI (00.02)" indicates the current association is "MARKEL AMERICAN INSURANCE CO". A "Diary/Attachments" link is visible. On the right side of the screen, a quote information box shows "CAROL PREMO (Quote - New-Approved)" with the identifier "QT00000003919". Below this, a horizontal menu bar contains links for "Owner Personal", "Boat", "Operator", "Assignment", "Coverage", "Issue Operator Info", "Risk Location", and "Additional Interest Info". The "Additional Interest Info" link is highlighted. A sub-section titled "Additional Interest Information" contains a dropdown menu labeled "Select Risk: 1990 SKI SUPREME/GENMAR IND Ski Supreme". Below the dropdown are three buttons: "Add Additional Insured", "Add Lienholder", and "Save For Later". At the bottom of the page is a "« Back" link and a "Done" button.

2. Select “Add Additional Insured” or “Add Leinholder” depending on which one you are adding. This will change the screen as shown below:
3. Enter the name and address of the Additional Interest or the Lienholder and click the “Next” button. If there is more than 1 unit on the quote, you must select that unit from the drop down box and repeat the last step.

If the Lienholder or Additional Interest happens to be the same for one or more units, you may use the Copy/Paste function. Enter in the applicable information, and then click “Copy”. Select the next unit that the entity needs to be added to and click “Paste”. All of the appropriate information will copy over. This may be done as many times as necessary.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Go Links

Address http://corpwebuat30:8083/Express30/default.aspx

Owner Personal Boat Operator Assignment Coverage Issue Operator Info Risk Location Additional Interest Info * Indicates a required field

Additional Interest Information

Select Risk: 1990 SKI SUPREME/GENMAR IND Ski Supreme

Add Lienholder

Type	Additional Insured
Name	<input type="text"/> *
Zip Code	<input type="text"/> *
Address 1	<input type="text"/> *
Address 2	<input type="text"/>
City/County	<input type="button" value="select"/> *
State	<input type="text"/>

Done Local intranet

If there is no Lienholder or Additional Interest, you may click the next button to proceed to the [Submission Screen](#) to finish the issuing process.

SUBMISSION—Refer, Apply Payment & Issue

Once the final 3 screens have been completed, the [Submission Screen](#) is your final stop.

The action you are able to take at this time is based on your authority as well as if the risk is approved for issuance.

If you have received a rating message that advises that the risk must be referred, at this time you will refer the policy by clicking the “Refer” button or click “Exit”. (See instructions that follow regarding referrals)

If the Policy is ready to issue, click the “Complete Issuance” button shown below. The system will force you to enter an Effective Date.

The effective date of the policy cannot be less than 5 days or more than 60 days from today's date.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

Name: RYAN BENNETT * Indicates a required field

Previous Policy Number: N/A

Effective Date: 2/14/2008 *

Premiums

Total Annual Premium:	Total Written:	Prior Total Annual:	Written Change:
\$951.00	\$951.00	\$0.00	\$951.00

Issue Notes

Remarks

Available Actions

Print Refer Move Agency **Complete Issuance** Exit

« Back

Done Local intranet

Complete Issuance:

Clicking the “Complete Issuance” button will load the Payment Information. A Payment box will appear as shown below.

Note: If any blue fields have not been filled out for a Markel High Performance or Markel Helmsman Yacht, the agent will be required to go back and enter in the missing information.

The screenshot shows a Microsoft Internet Explorer window with the title bar "Market American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "http://corpwebuat30:8083/Express30/default.aspx". The main content area displays a policy issuance form for "MAIC HYBoat WI (00.01)".

Policy Information:

- Full Annual Premium: \$951.00
- Policy Term: 12 Months
- Coverage Start Date: 2/14/2008 (mm/dd/yyyy)
- [View Payment Schedules](#)

Payment:

- Payment Plan: (Select) *
- Payment Type: (select) *
- Amount: [Text Box] * \$0.00
- Minimum Payment Amount: [Text Box]

Premiums:

- Total Annual Premium: \$951.00

Issue Notes:

Remarks: [Text Area]

Available Actions:

- [Print](#)
- [Refer](#)
- [Move Agency](#)
- [Complete Issuance](#)
- [Exit](#)

Right Panel:

- (Quote - New-Pending) QT00000009075 - HYBoat IN MARINE INS. SERVICES
- * Indicates a required field

Payment Information:

At the top of the payment box, the total policy premium is displayed as well as the policy term.

1. Click on “View Payment Schedules” to view what installment plans are available based on that premium amount.
2. Pick the chosen payment plan from the drop down box.
3. Choose the Payment Type. Depending on the user authority and the risk, not all payment types may be available. (See below for Credit Card Payments.)
4. Enter the Payment amount, if applicable. The system will advise what the minimum payment amount is.
5. For check or money orders, you will be required to enter the reference number (see Accounting Procedure section that follows).
6. Once the above has been entered, click “Complete Issuance” to finish issuing the policy or “Cancel” to discontinue issuing the policy.
7. An [Issue Confirmation Screen](#) will appear advising that the policy has been issued and that output will be mailed out the next business day. (see below) The assigned policy number will be visible in the upper left-hand corner of the orange summary box.

Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Stop Home Favorites Address http://maicmagicddct:8080/Express21/default.aspx Go Links

MARKEL AMERICAN INSURANCE COMPANY

MAIC SmallBoat AL (01.01) Current Association: MARKEL AMERICAN INSURANCE CO

Home New Open Messages Save Password Batch Logout

Diary/Attachments

Issue Confirmation

Issue Confirmation

Thank you for your business!
Policy output will be mailed on the next business day.
Please call our office if you have any questions.

Proceed to Policy Admin

Policy Number: MSB00000003871	Premium Written: \$272.00	Effective Date: 09-12-2007	Risk State: AL
Status: In Force	Payment Plan: Full Pay	Expiration Date: 09-12-2008	Rate Effective Date: 09-11-2007
Product: SmallBoat_SmallBoat	Billing Method: Direct Bill	Equity Date:	Last Modified Date: 09-11-2007
Term: 12 Months		Grace Equity Date:	

Insured: test quote 123 test address Birmingham, AL 35201 262-548-9880	Producer: 90700 - 0000001 AMERICAN UNDERWRITING MGRS P O BOX 906 PEWAUKEE, WI 53072-0906 800-236-2862	Agency: 90700 AMERICAN UNDERWRITING MGRS P O BOX 906 PEWAUKEE, WI 53072-0906 800-236-2862
---	---	---

Unit	HIN
2007 BAYLINER	hullserial number

Done Local intranet

8. Also, as soon as output is available, it may be printed in your office.
9. At this point, you may exit the policy by starting a new transaction, or proceed to Policy Administration.

For Accounting / Check Deposits / etc.

please see the Accounting Procedures section towards the end of the manual.

Paying by Credit Card:

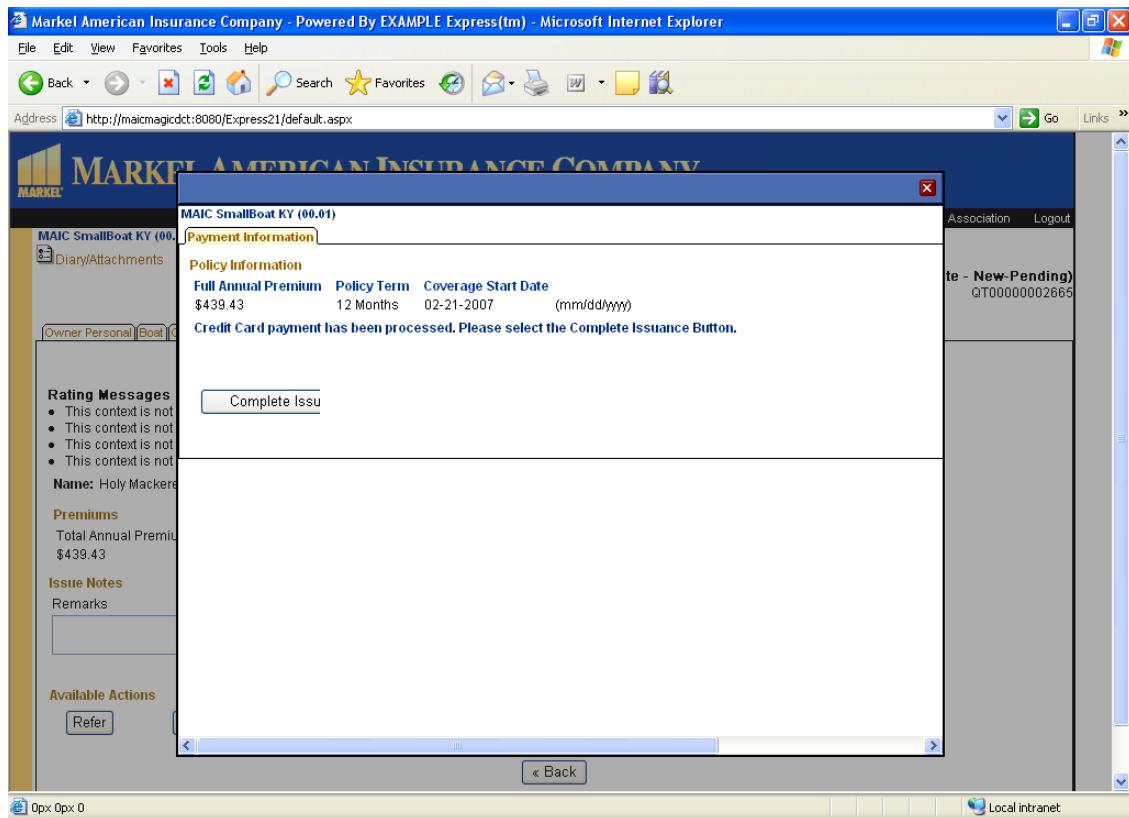
1. Select Credit Card as the Payment type.
2. The screen will change appearance as shown in red below.
3. If the cardholder is the same as the insured, click 'Yes'. The fields will populate with the applicant's mailing address information.

The screenshot shows a Microsoft Internet Explorer window for Market American Insurance Company. The main page displays policy details like MAIC SmallBoat KY (00, \$439.43). A modal dialog box is open for payment processing. The dialog includes fields for Payment Plan (Three Installments), Payment Type (Credit Card selected), and Amount (\$201.43). It also asks if the Cardholder is the same as the Insured (Yes selected). The highlighted section contains 'Cardholder Information' (Name, Address, City, Zip Code, State) and 'Credit Card Information' (Credit Card Type dropdown, Credit Card #, Security Code, Expiration Date). A note at the bottom of this section cautions against multiple clicks on the Submit Payment button.

4. If the cardholder is not the same as the insured, click 'No' and enter in all required information.
5. Complete the Credit Card Information section.
6. Once complete, click "Submit Payment".

NOTE: **Do not click on the button more than once or you risk the credit card being charged multiple times.**

7. Please wait for the confirmation page (as shown below).



8. Click "Complete Issuance".

REFERRING FOR APPROVAL

Any time a quote or other transaction is outside a user's authority, it must be referred for approval. For efficiency, referral submissions should be made via the MAGIC system messaging capability.

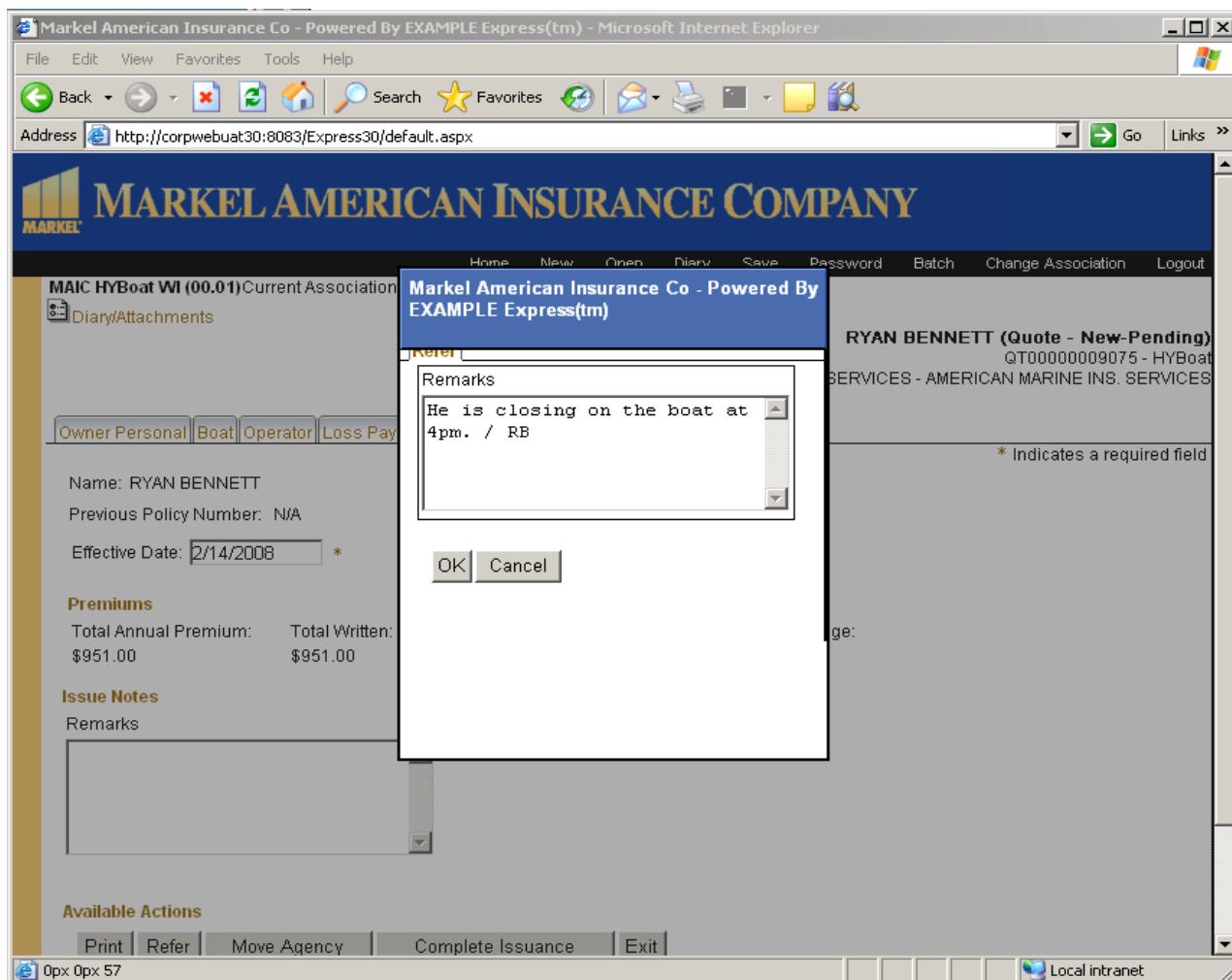
If the risk is outside of your authority a quote indication will be provided. The system will alert you that approval is required. Quotes may be released as an indication without being submitted to the company. When releasing an indication to an applicant, please be sure to notify them that coverage and premium is subject to company review and approval.

Any risk requiring referral will follow an established hierarchy. For instance, a risk entered by a sub-producer will be referred to the General Agent. If the General Agent does not have the authority to approve the risk, the General Agent will refer the risk to MAIC. Once approved, the risk will follow the chain back down to the sub-producer.

The screenshot shows a Microsoft Internet Explorer window displaying a risk entry form for 'MAIC HYBoat WI (00.01)'. The current association is listed as 'MARKEL AMERICAN INSURANCE CO'. The 'Submission' tab is active. The form includes fields for Name (RYAN BENNETT), Previous Policy Number (N/A), Effective Date (2/14/2008), Premiums (Total Annual Premium: \$951.00, Total Written: \$951.00, Prior Total Annual: \$0.00, Written Change: \$951.00), and Issue Notes (Remarks). At the bottom, there is a 'Available Actions' section with buttons for Print, Refer, Move Agency, Complete Issuance, and Exit. The 'Refer' button is circled in red.

For example, you quote a risk that requested \$1,000,000 liability limits. Your agency does not have authority to issue the policy so it needs to be referred to MAIC for approval. On the [Submission Screen](#), on the lower left-hand side is a "Refer" button. By clicking this button, you have initiated the referral process.

1. A dialog box will appear that allows you to include a message with your referral.



2. If desired, enter a message and click "OK".

Given the scenario outlined above, this quote will be referred to MAIC.

Note: Once the referral is sent, the quote is read only and is unable to be modified by the original sender.

3. Someone at MAIC will open the message to see why the risk was referred. They will then load the policy and view what has been entered.
4. A decision will then be made. The risk will either be *approved*, *declined*, or put into *pending* status awaiting additional information.
5. Once that decision is made, a message will be sent back to your Agency. (See the screen print that follows)

The screenshot shows a Microsoft Internet Explorer window for the Markel American Insurance Company. The title bar reads "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar contains Back, Forward, Stop, Refresh, Search, Favorites, Home, and other standard icons. The address bar shows the URL "https://maicmgcwebint1:8085/Express21/default.aspx". The main content area features the Markel logo and the text "MARKEL AMERICAN INSURANCE COMPANY". A navigation bar at the top right includes Home, New, Open, Messages, Save, Password, and Logout. Below this, a message states "Current Association: AMERICAN UNDERWRITING MGRS AGCY INC". A "Welcome" message is displayed, followed by "Messages". A table lists one message: "Date: 2007-04-04, UserID: jfrederick, Activity Description: Originate, Originate, Approval: QT000000000187 has been approved on 2007-04-04". A note below the table says "Showing 1-1 of 1 total message(s)". A red box highlights the approval message in the table. On the left sidebar, there is a yellow box containing "Welcome, Jennifer Fredrick External Active Session: Robert Radtke" and a printer icon. A status message at the bottom left says "You have 0 new and 0 overdue message(s)".

If the risk is **approved**, the quote may be issued.

If the risk is **declined**, a reason should be provided to advise if anything can be provided to change that decision.

If the risk is **pending**, the message will advise what is needed prior to giving the approval or declination.

In the example above, this quote was approved. In the box outlined in red, note the Activity and the description—both indicating “Approve”.

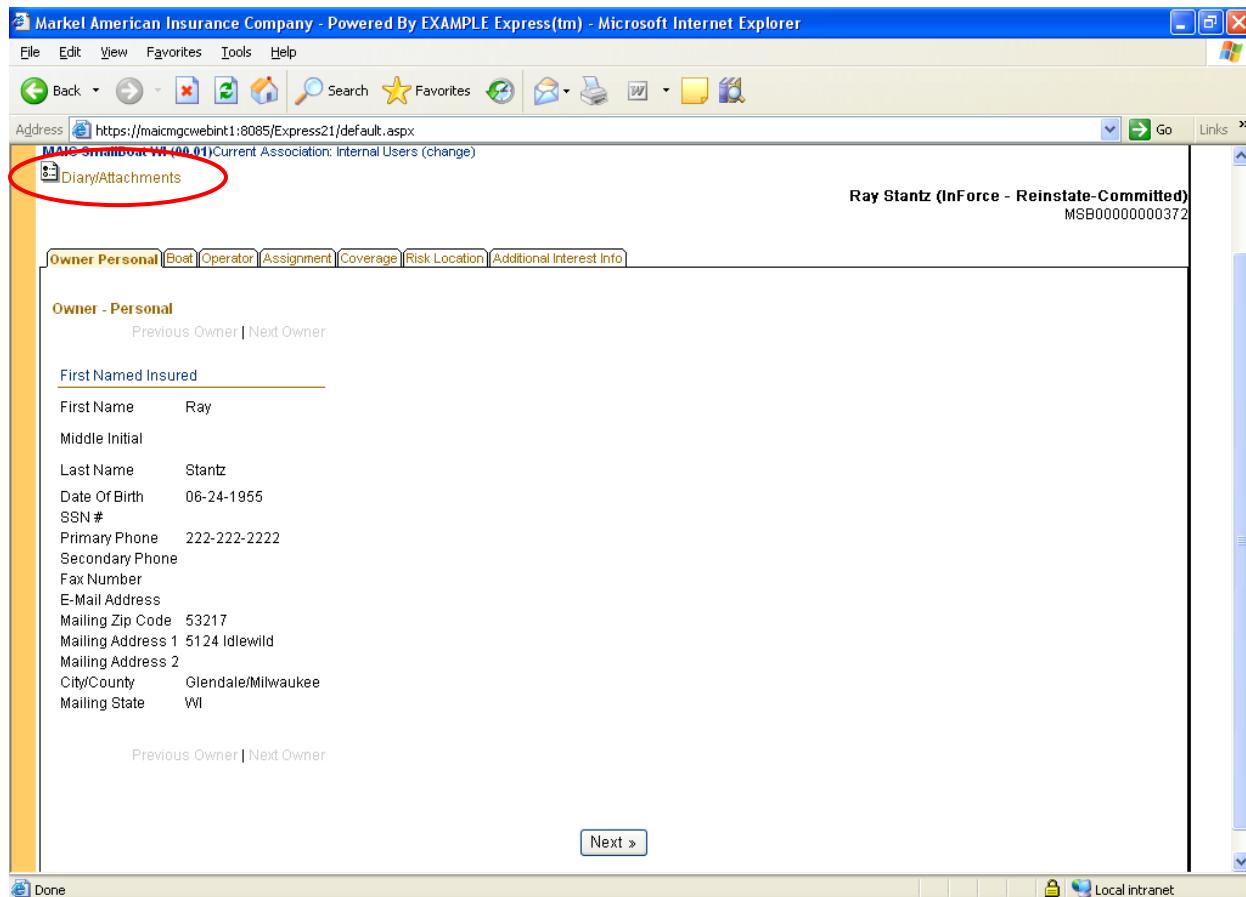
6. If a Sub-Producer is involved on the risk, you will need to advise them of the status and proceed accordingly.

Note: For Sub-Producers who use the Markel Marine Service Center, the referral request will be sent directly to MAIC—it will not go to the General Agent.

The Referral declination or approval will be sent directly back to the Sub-Producer.

POLICY OUTPUTS AS ATTACHMENTS

At any time while in a quote or policy documents may be attached or diary entries made by clicking on the “Diary/Attachments” Icon in the upper left-hand corner. (See red oval shown below.)



Upon clicking on the “Diary/Attachments” Icon, a Policy Details Screen will display, as shown below.

Policy Details

LOB:	SmallBoat_SmallBoat (Status: InForce)	Client Name:	Ray Stantz
Policy Number:	MSB000000000372	Primary Contact:	
Effective/Expiration Date:	2007-02-08 to 2008-02-08	Phone Number:	222-222-2222, ext:
Producer:	admin	Address:	5124 Idlewild
Agency:	Internal Users	City, State ZIP	Glendale, WI 53217

Current Filters
quoteID 972

Query Builder
and Sender contains

New Diary Item

Date UserID Originated Originated Activity Description Priority Policy # Eff Date Due Date UserID Closed Closed Date Attachments

2007-02-08	admin	Issue	Transaction Committed	2-Normal	-	-	-	-	-
2007-02-08	admin	Issue	Transaction Committed	2-Normal	-	-	-	-	-
2007-02-08	admin	Issue	Transaction Committed	2-Normal	-	-	-	-	-

Showing 1-3 of 3

Date Attachments Caption FileName

File to upload: Browse...
Enter caption: Add Attachment

Date Action Who

2007-02-08 02:04:00	Committed	admin
Reinstate-Committed		
2007-02-08 02:04:00	Committed	admin
Cancel-Committed		
2007-02-08 02:03:00	Committed	admin
New-Committed		

The area displayed in pink above is the Attachment function.

To add an Attachment:

1. Click on "Browse".
2. Search your computer to find the document you'd like to attach.
3. Once you've found the document, click on the document name and then click on "Open".
4. In the "Enter Caption" field, enter the name of how you would like the attachment labeled.
5. Click "Add Attachment" to attach the file to the policy.

To add a Diary Item:

1. Click on "New Diary Item".
2. A Message Details screen will appear as shown below.

Market American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Home Search Favorites Address Go Links

Message Details

Message Details * Indicates a required field.

Message Information

Create Date:	Created By:
2/15/2008 11:29	HPLevel1IntUser
AM	

Policy Information

Agency:	Client:	Quote Number:
AMERICAN UNDERWRITING MGRS	RYAN BENNETT	QT00000009168

Message

Security Level:	Activity/Reason:	Priority:	Due Date:
Internal <input type="button"/>	Info <input type="button"/>	Medium <input type="button"/>	N/A

Subject:

Body:

Message Recipients

Category:	Recipient:	Policy/Client ID:
Policy-Level <input type="button"/>	N/A	11388 <input type="button"/>

3. In the **Message** area, select the Security Level, if applicable.
 4. Select the Activity/Reason.
 5. Select the Priority.
 6. Enter a Due Date, if applicable.
 7. Enter a Subject.
 8. Enter the Body text.
 9. In the **Message Recipients** area, select the Category. If one of the “specified” categories is chosen, a list of potential Recipients will appear in a drop down box.
 10. To add a Recipient, click/select their name from the drop down list, and then click the “Add Recipient” button.
 11. If you would like to add an attachment, click the “Allow Attachments” button.
Once the latter has been completed, click “Update Details”. This will send the message

VIEWING A POLICY

Once a policy is activated, you can use the “Open” function to search for the policy.

1. Search for the policy you are looking for.

Reminder: Instructions on how to search for a policy or quote can be found in the section titled “Open” at the beginning of this manual.

Open Existing Quote/Policy

Active Session: (none)

Quick searches:

Name »
Quote/Policy # »
Set LOB
Quote Referral Service Request

Advanced Search
and Name contains Add
Quick Query:

Current Filters
X Status contains InForce
Apply Filter Clear Filter Save Filter Show Deleted

Policy/Quote Number	Insured Name	State	Line	Status	Transaction	Description	Eff. Date	Last Modified
MHP00000005374	ANGELINA JOLIE	KY	HPBoat_HPBoat	InForce	New-Committed	GA: 10224 - 0000001	2008-02-15	2008-02-20
MHP00000005375	ANGELINA JOLIET	KY	HPBoat_HPBoat	InForce	New-Committed	GA: 10224 - 0000001	2008-02-15	2008-02-20
MHP00000005319	BABY GOTBACK	WI	HPBoat_HPBoat	InForce	New-Committed	GA: 10224 - 0000001	2008-02-15	2008-02-15
MHP00000005133	CATMANAGEMENT ONE	TX	HPBoat_HPBoat	InForce	Reissue-Committed	GA: 10224 - 0000001	2008-02-08	2008-02-08
MHP00000005152	CATMANAGEMENT THREE	TX	HPBoat_HPBoat	InForce	Endorse-Referred	GA: 10224 - 0000001	2009-02-01	2008-02-14
MHP00000005138	CATMANAGEMENT TWO	TX	HPBoat_HPBoat	InForce	New-Committed	GA: 10224 - 0000001	2008-02-01	2008-02-01
MHP00000005251	FRIDAY TESTING	TX	HPBoat_HPBoat	InForce	Endorse-Pending	GA: 10224 - 0000001	2008-02-08	2008-02-08
MHP00000005210	FROSTY SNOWMAN	TX	HPBoat_HPBoat	InForce	Endorse-Pending	GA: 10224 - 0000001	2008-02-05	2008-02-05
MHP00000005035	JEREMY GREEN	GA	HPBoat_HPBoat	InForce	Reinstate-Committed	GA: 10224 - 0000001	2008-01-21	2008-01-24
MHP00000005244	JUNE BUGG	WI	HPBoat_HPBoat	InForce	New-Committed	GA: 10224 - 0000001	2008-02-10	2008-02-07

1-10 11-18 Prev Page | Next Page

2. Click on the policy number (shown on the left-hand side).
3. You will be taken to the TransACT screen as shown below.

The screenshot shows the Microsoft Internet Explorer browser window with the title "Market American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "http://maicmagicdct:8080/Express21/default.aspx". The main content area displays the "TransACT Master 2.10" software interface. At the top right, it says "Clark Griswold (InForce - Endorse - Committed)" and "MSB00000000414". Below this, there's a "TransACT" button. On the right side, there are two buttons: "View Service History" and "Apply Payment". The central part of the screen shows policy details:

Policy Number: MSB00000000414	Written Premium: \$752.96	Effective Date: 02-12-2007	Risk State: KY
Status: InForce	Payment Plan: Full Pay	Expiration Date: 02-12-2008	Rate Effective Date: 02-12-2007
Product: SmallBoat_SmallBoat	Billing Method: Agency Renewal	Equity Date:	Last Modified Date: 02-16-2007
Term: 12 Months		Grace Equity Date:	

Below these details, there are sections for "Insured:" and "Agency:". The insured is Clark Griswold, located at 6565 Test Case Ln, Jeffersontown, KY 40299, phone 111-222-3333. The agency is MM_E1SubAgency.

On the left, there's a "Transaction Type:" dropdown menu with options like "New", "Endorse", and "Endorse". On the right, there's a "Quick Filter" dropdown set to "All". Below these are three rows of transaction history:

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	02-12-2007	02-12-2008	\$159.75	\$159.75	Committed	CSR	02-12-2007
Endorse	02-12-2007	02-12-2008	\$752.96	\$593.21	Committed	CSR2	02-12-2007
Endorse	02-28-2007	02-12-2008	\$752.96	\$0.00	Committed	jfrederick	02-16-2007

- From the [TransACT screen](#), to simply view the policy, click on the magnifying glass, (the icon on the far left). This will allow you to view the policy as read only.
- When you are finished viewing the policy, click on the Submission tab and then click "Return to Admin". This will take you back to the [TransACT screen](#) where you started in step 3.

The screenshot shows the Microsoft Internet Explorer browser window with the title "Market American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "http://maicmagicdct:8080/Express21/default.aspx". The main content area displays the "MARKEL AMERICAN INSURANCE COMPANY" logo. At the top right, it says "Clark Griswold (InForce - New-Committed)" and "MSB00000000574". Below this, there's a navigation bar with links: Home, New, Open, Messages, Print, Password, Batch, Change Association, and Logout. The central part of the screen shows policy details:

Owner Personal	Boat	Operator	Assignment	Coverage	Risk Location	Additional Interest Info	Submission
--------------------------------	----------------------	--------------------------	----------------------------	--------------------------	-------------------------------	--	----------------------------

Name: Clark Griswold

Premiums

Total Annual Premium:	Total Written:	Prior Total Annual:	Written Change:
\$1,202.39	\$1,202.39	\$0.00	\$1,202.39

Review Before Renew has been Completed.

Available Actions

[Return To Admin](#)

[« Back](#)

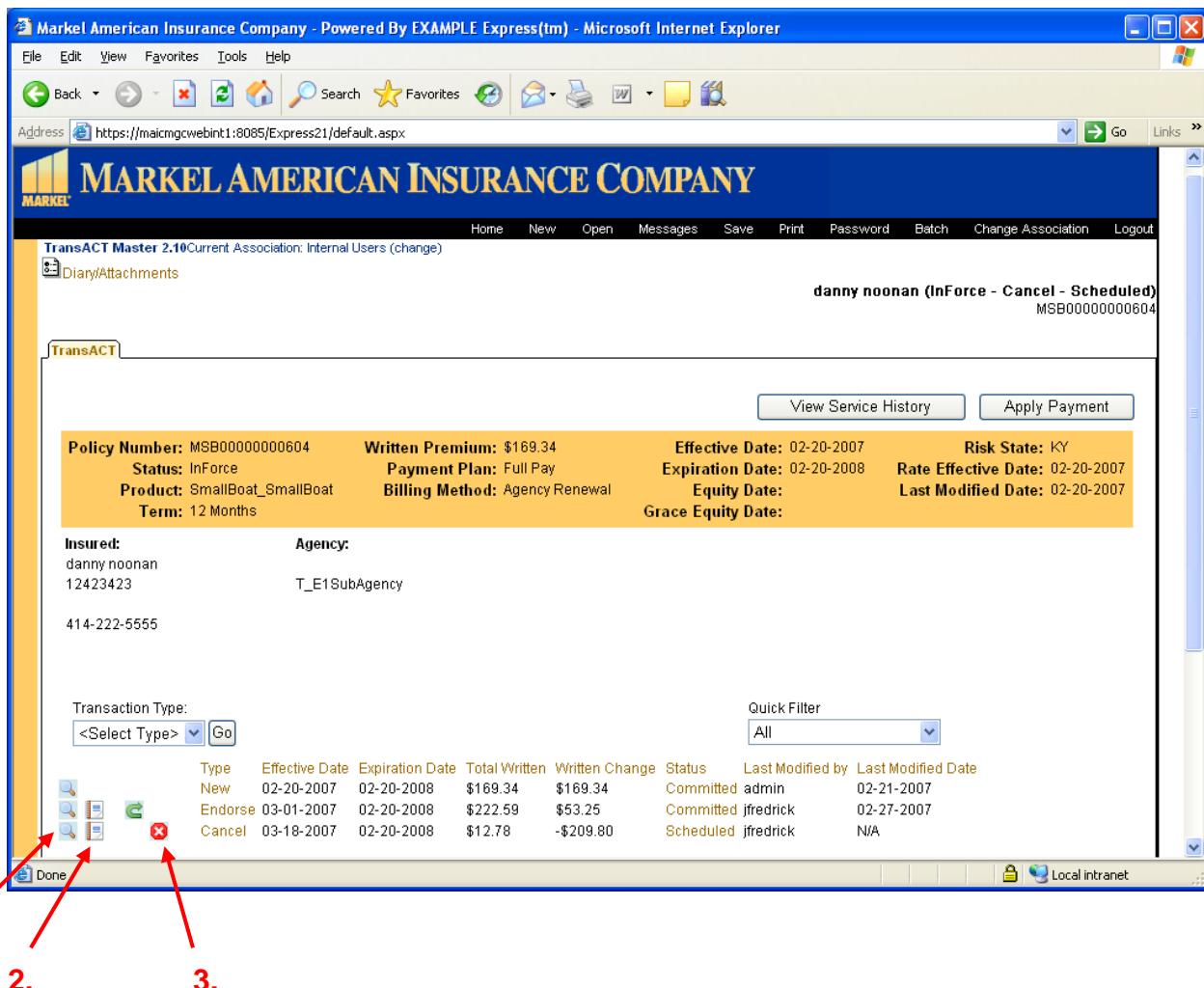
From the [TransACT screen](#) you may then service the policy as you normally would, including applying a payment.

The Section that follows will cover all aspects of Policy Maintenance using TransACT.

TransACT—POLICY MAINTENANCE

TransACT ICONS (Next to each transaction)

There are 3 Icons that appear on the [TransACT Screen](#) next to each transaction. (see screen shot below)



1. View Policy

Will allow you to view the policy as read only. No changes can be made.

2. Get Change Summary

Will display a screen showing the changes made by that transaction.

3. Schedule to Abort

Will prevent 'Scheduled' transaction from occurring. If the "X" is clicked, the scheduled transaction will be removed.

ENDORSE

1. In the Transaction Type drop down box, select “Endorse” and click “Go”.

The screenshot shows the TransACT Master 2.10 software interface. At the top, there's a toolbar with various icons like Grab, Exit, Search, Favorites, and Print. Below the toolbar, the URL is http://corpwebdata0005455/Express30/default.aspx. The main header features the "MARKEL AMERICAN INSURANCE COMPANY" logo. A navigation bar includes Home, New, Open, Diary, Save, Password, Batch, Change Association, and Logout. On the right, it says "JOY RIDER (InForce - New - Committed) MSB00000005455". The main content area has a yellow header bar with policy information: Policy Number: MSB00000005455, Written Premium: \$277.00, Effective Date: 2/26/2008, Risk State: IL. Below this, it lists the Insured (JOY RIDER), Producer (90700-0000001), and Agency (90700). It also shows the policy address: 1 MARINA WAY, Rockford, IL 61108, P O BOX 906, PEWAUKEE, WI 53072-0906, 262-548-9880, 236-2862. Under "Transaction Type", "Endorse" is selected. A "Quick Filter" dropdown is set to "All". At the bottom, a table shows transaction details: Type (New), Effective Date (2/26/2008), Expiration Date (2/26/2009), Total Written (\$277.00), Written Change (\$277.00), Status (Committed), Last Modified by (kramsby), and Last Modified Date (2/26/2008).

2. Enter the Effective Date of your Endorsement transaction
3. Select the Reason for your transaction from the Reason drop down box (you may select multiple reasons by clicking the “Add Reason” button). Additional notes about your transaction may be entered in the “Detail” box. (See Screen Shot that follows.)

4. After you have completed the page, click "Continue". If you do not wish to continue, click "Exit" and you will be returned to the [TransACT Screen](#).

The system will present you with the policy master pages which allow you to access any of the pages to make the necessary changes to the policy.

Upon completion of your changes, proceed to the Submission page by clicking on the "Submission" tab or continuing to click "Next".

If the endorsement is out of the agent's authority, a referral will be required. Click on the button labeled "Refer" circled in red.

Market American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites Address https://maicmgcwebint1:8085/Express21/default.aspx Go Links >

MARKEL AMERICAN INSURANCE COMPANY

Home New Open Messages Save Password Logout

MAIC SmallBoat MI (00.01) Current Association: AMERICAN UNDERWRITING MGRS AGCY INC

Diary/Attachments Robert Radtke (InForce - Endorse-Pending)
MSB000000002050

Owner Personal Boat Operator Assignment Coverage Risk Location Additional Interest Info Submission

Name: Robert Radtke Endorse / 04-11-2007

Premiums

Total Annual Premium:	Total Written:	Prior Total Annual:	Written Change:
\$211.00	\$211.00	\$211.00	\$0.00

Available Actions

Submission Screen:

The [Submission Screen](#) (as shown above) will show you the new premium amounts resulting from your transaction and the total amount of premium change.

Modify Reasons:

The “Modify Reasons” button (see below) can be used to change the Reason that you selected for your transaction or to add additional Reasons.

Market American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites Address http://maicmgcwebint1:8085/Express21/default.aspx Go Links >

MARKEL AMERICAN INSURANCE COMPANY

Home New Open Messages Print Password Batch Change Association Logout

MAIC SmallBoat KY (00.01) Current Association: Internal Users (change)

Diary/Attachments Judge Smalls (InForce - Endorse-Pending)
MSB00000000376

Owner Personal Boat Operator Assignment Coverage Issue Operator Info Issue Unit Info Additional Interest Info Submission

Rating Messages

- This context is not approved to set the status to Refer
- This context is not approved to set the status to App
- This context is not approved to set the status to Decline
- This context is not approved to set the status to Pending

Name: Judge Smalls

Premiums

Premium: Premium Written: Prior Premium Premium	\$222.59	\$222.59	\$222.59
---	----------	----------	----------

This policy has been marked to review before renew.

Available Actions

Market American Insurance Company - Powered By EXAMPLE Express(tm)

TransACT Master 2.10

Reason Detail

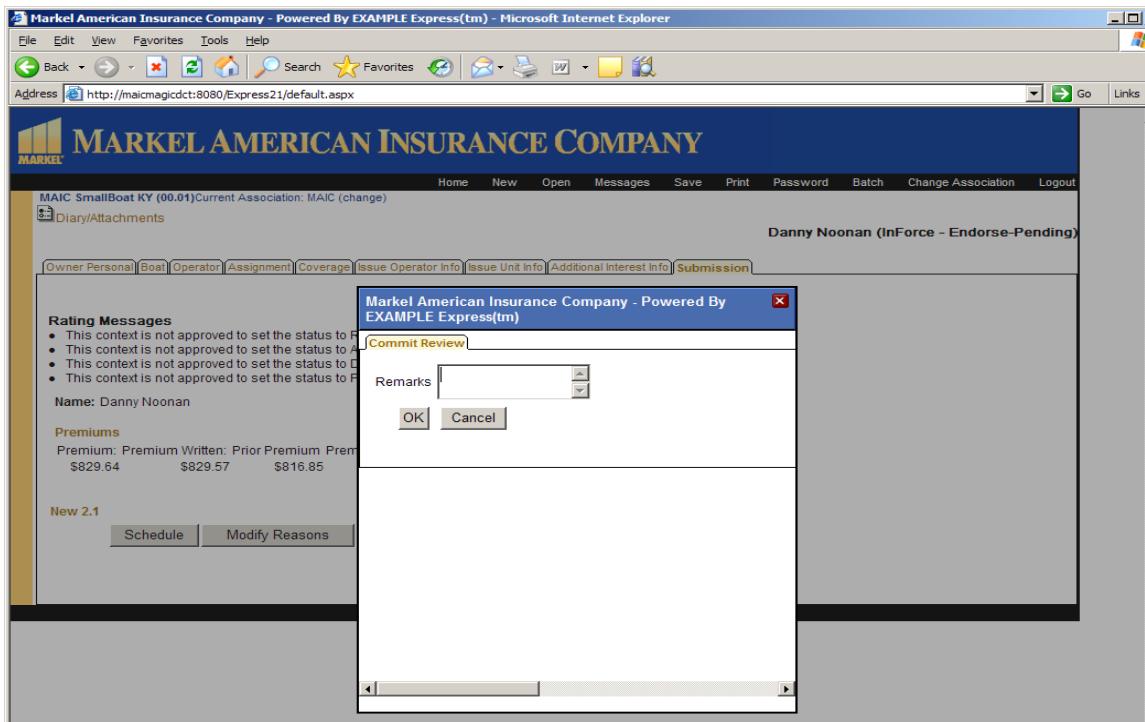
Reason List:

Reason

Upon completion of your transaction, you can choose to “Complete Issuance” or “Save for Later”.

Complete Issuance:

Will present you with a Remarks section where you can enter detailed remarks about your transaction.



Save for Later:

Will return you to the [TransACT Screen](#) for your policy and you will see your transaction listed. You will see the status listed as "pending".

Note: If you process multiple changes to a policy in one day, the insured will only receive the hard copy of the last one processed that day

CANCEL

When the Cancel function is chosen in TransACT, the ability to cancel both due to Company Request and Insured Request is given.

Company Requested Cancellation:

1. Select your transaction type of Cancel and click "Go". (see screen that follows)

The screenshot shows the TransACT Master 2.10 software interface. At the top, it displays the company logo and name: MARKEL AMERICAN INSURANCE COMPANY. The main menu bar includes File, Edit, View, Favorites, Tools, and Help. Below the menu is a toolbar with various icons. The address bar shows the URL: http://corpwebuat30:8083/Express30/default.aspx. The main content area is titled "TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO". It shows a policy summary for policy number MSB00000005455, effective date 2/26/2008, and risk state IL. Below this, there are sections for Insured, Producer, and Agency details. A "Transaction Type" dropdown menu is open, showing "Cancel" as the selected option. To the right of the dropdown is a "Quick Filter" dropdown set to "All". At the bottom of the screen, there is a table listing transaction types: New, Endorse, Effective Date, Expiration Date, Total Written, Written Change, Status, Last Modified by, and Last Modified Date. The table shows two rows: one for a New transaction on 2/26/2008 and another for an Endorsement on 2/26/2008.

2. Select a Reason for cancellation from the drop down box.

For company request cancels you must also fill in the Detail box with more specific, appropriate detail as this verbiage will also print on the Cancellation form.

Ex. You select the reason called "Unacceptable Driving Record" but in the detail box (see below) you insert: "Speeding violations: 1/2007, 3/2006, etc."

You need to put enough detail that the insured understands exactly why they were canceled because if you do not, in some states the cancellation form will be considered unacceptable and void.

Market American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites

Address Go Google Settings

MARKEL AMERICAN INSURANCE COMPANY

TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

TransACT Cancel Pages

Cancel

* Indicates a required field

Reason: Other Underwriting Reason * FAILURE TO PROVIDE A *

Return Method: Prorata *

Effective Date: 4/1/2008 *

Schedule Date (optional): 4/6/2008

Print Suppress

Exit Continue

JOY RIDER (InForce - Endorse - Committed)
MSB00000005455

Policy Number: MSB00000005455 Writer: Pay Bill
Status: Inforce Product: SmallBoat_SmallBoat Term: 12 Months

Insured: JOY RIDER Producer: 90700-00 AMERICAN
1 MARINA WAY P O BOX 9 PEWAUKEE
Rockford, IL 61108 800-236-2
262-548-9880

Transaction Type: Go

Type	Effective Date	Endorse	2/26/2008	2/26/2008	\$277.00	\$0.00	Committed	kramsby	2/26/2008
New									
Endorse									

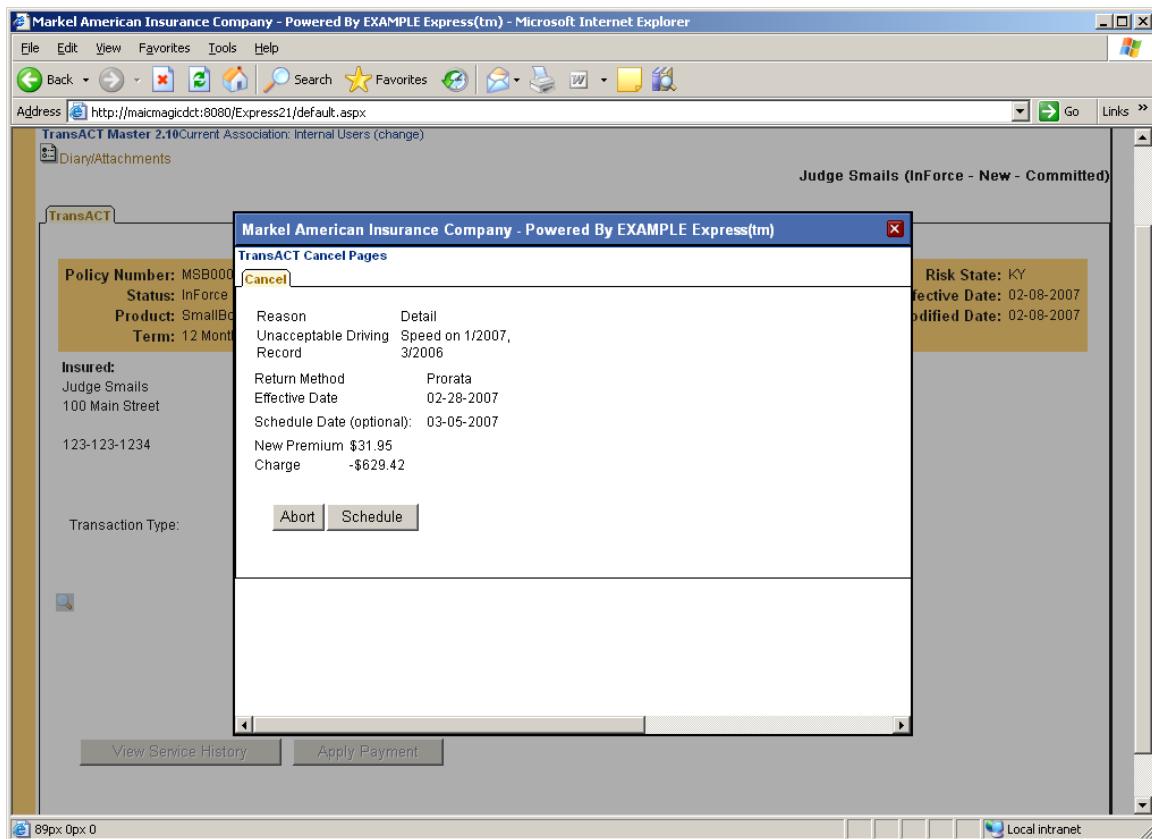
Done Local intranet

- The Return Method box will automatically populate with the cancel method choices you have based on the Reason for Cancellation. You must choose a method.

The Reason you selected in Step 1 above determined that this was a Company Request cancellation so the system automatically populated the Cancellation Effective date with the earliest legal cancel date based on state requirements and proper mailing time.

Note: The “Schedule Date” will tell you the actual day that the system will change the policy status from InForce to Cancel and is informational only.

- Click the “Continue” button to proceed OR “Exit” to return to the [TransACT Screen](#).



The next screen will now show you the new written premium on this policy along with the unearned premium (negative written change) that will be applied once the policy is truly cancelled.

5. Click the “Schedule” button to finish the Cancellation transaction and be returned to the main [TransACT Screen](#) OR click the “Abort” button if you want to back out from the transaction and return to main [TransACT Screen](#).

TransACT Master 2.10 Current Association: AMERICAN UNDERWRITING MGRS AGCY INC

Diary/Attachments

Robert Radtke (InForce - Cancel - Scheduled)
MSB00000002050

Policy Number: MSB00000002050	Written Premium: \$211.00	Effective Date: 04-09-2007	Risk State: MI
Status: InForce	Payment Plan: Two Installments	Expiration Date: 04-09-2008	Rate Effective Date: 04-09-2007
Product: SmallBoat_SmallBoat	Billing Method: Direct Bill	Equity Date:	Last Modified Date: 04-09-2007
Term: 12 Months		Grace Equity Date:	

Insured: Robert Radtke	Producer: 90199 - 0000001 American Underwriting Managers P O Box 906	Agency: 90199 - 0000001 AMERICAN UNDERWRITING MGRS AGCY INC P O BOX 906 800-236-2862
----------------------------------	--	---

Transaction Type: <Select Type> Go

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	04-09-2007	04-09-2008	\$211.00	\$211.00	Committed	jfrederick_ext	04-11-2007
Endorse	04-11-2007	04-09-2008	\$211.00	\$0.00	Pending	N/A	
Cancel	04-26-2007	04-09-2008	\$9.00	-\$202.00	Scheduled	jfrederick_ext	N/A

The main **TransACT Screen** will show you that your Cancellation is ‘scheduled’ and will display the effective date as well.

Scheduling the transaction will cause the Direct Notice of Cancellation to print and be sent to the customer the next morning.

If you click the “Abort” button (Red ‘X’ to the left of the Cancel transaction), then you will abort the scheduled cancel and if the notice was already printed, a continuation notice will be sent to the customer to tell them their policy will not be cancelled.

Ex. You scheduled a cancellation on the policy for lack of an updated survey but then you received the survey from the customer, so you use the “Abort” function which will remove the scheduled cancellation and will generate a continuation notice during the nightly batch which will be mailed the next business day.

Note: In the example shown above, the policy will officially be cancelled as of 4/26/2007 (policyholder has no coverage from this point on).

The policy status in the system will not change from Inforce to Canceled until the transaction is Committed during the nightly batch run on 5/1/2007.

Insured Requested Cancellation:

1. Select your transaction type of Cancel and click "Go".

The screenshot shows the MARKEL AMERICAN INSURANCE COMPANY TransACT Master 2.10 software interface. The main window displays a policy detail page for policy number MSB00000005455. The policy information includes:

Policy Number: MSB00000005455	Written Premium: \$277.00	Effective Date: 2/26/2008	Risk State: IL
Status: InForce	Payment Plan: Full Pay	Expiration Date: 2/26/2009	Rate Effective Date: 2/26/2008
Product: SmallBoat_SmallBoat	Billing Method: Direct Bill	Equity Date:	Last Modified Date: 2/26/2008
Term: 12 Months		Grace Equity Date:	

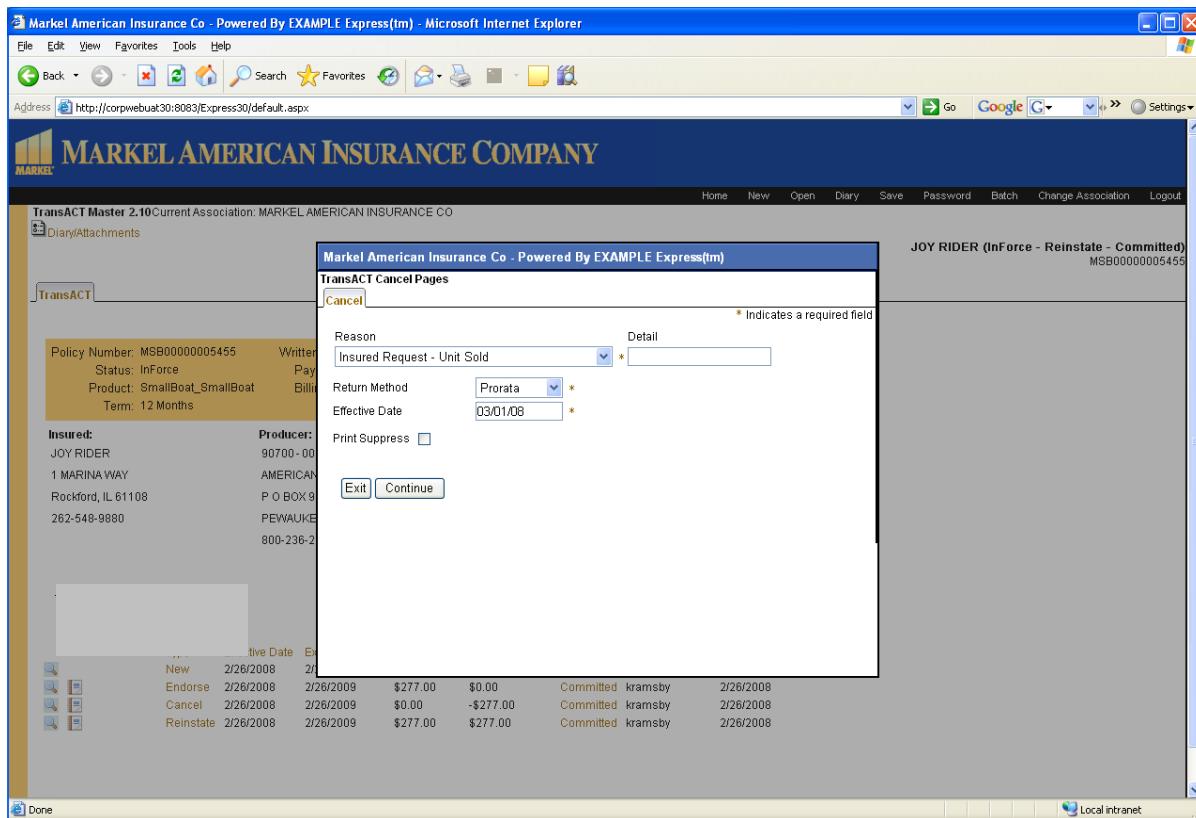
The 'Insured' section lists:

JOY RIDER	Producer: 90700-0000001	Agency: 90700
1 MARINA WAY	AMERICAN UNDERWRITING MGRS	AMERICAN UNDERWRITING MGRS
Rockford, IL 61108	P O BOX 906	P O BOX 906
262-548-9880	PEWAUKEE, WI 53072-0906	PEWAUKEE, WI 53072-0906
	800-236-2862	800-236-2862

A 'Quick Filter' dropdown menu is set to 'All'. Below the filter is a table of transaction history:

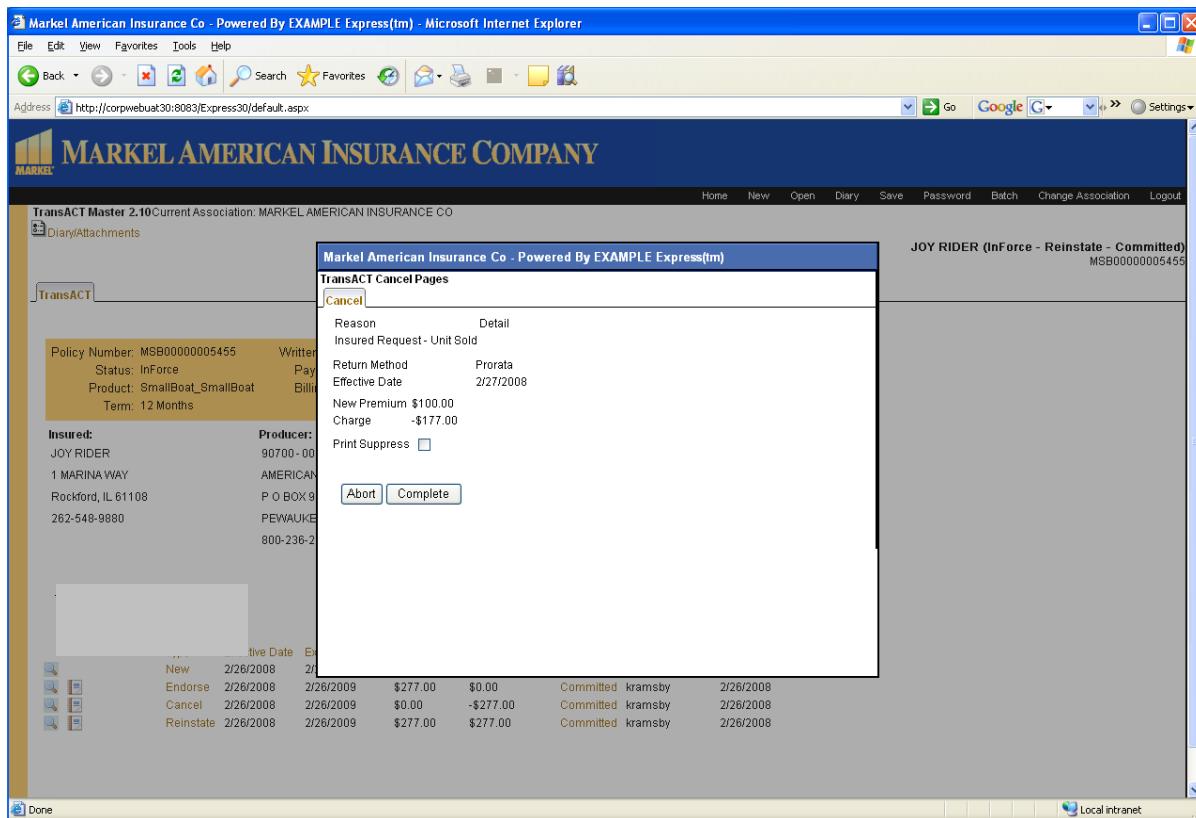
Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	krambsby	2/26/2008
Endorse	2/26/2008	2/26/2009	\$277.00	\$0.00	Committed	krambsby	2/26/2008
Cancel	2/26/2008	2/26/2009	\$0.00	-\$277.00	Committed	krambsby	2/26/2008
Reinstate	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	krambsby	2/26/2008

2. Select a Reason for cancellation from the drop down box.
3. If the Detail box is required, please enter any required, appropriate details/reasons.
4. The Return Method box will automatically populate with the cancel method choices you have based on the Reason for Cancellation. You must choose a method.



The Cancellation effective date should be entered based on the date requested by the insured. The system automatically populates today's date so you will need to adjust date accordingly.

5. Click the “Continue” button to proceed OR “Exit” if you want to return to the [TransACT Screen](#) with no changes.



The next screen (as previously shown) will show you the new written premium on this policy along with the unearned premium (negative written change) that will be applied once the policy is truly cancelled.

6. Click the “Complete” button to finish the Cancellation transaction and be returned to the main **TransACT Screen** OR click the “Abort” button if you want to back out from the transaction and return to main **TransACT Screen**.

The screenshot shows the TransACT Master 2.10 software interface. At the top, the title bar reads "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar contains icons for Back, Forward, Stop, Refresh, Search, Favorites, and other common functions. The address bar shows the URL "http://corpwebus30:8083/Express30/default.aspx". The main content area features the "MARKEL AMERICAN INSURANCE COMPANY" logo. A banner at the top says "TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO". Below it, a link to "Diary/Attachments" and a status message "JOY RIDER (InForce - Cancel - Committed) MSB00000005455". The main form displays policy details: Policy Number: MSB00000005455, Written Premium: \$277.00, Effective Date: 2/26/2008, Risk State: IL. Status: InForce, Payment Plan: Full Pay, Expiration Date: 2/26/2009, Rate Effective Date: 2/26/2008. Product: SmallBoat_SmallBoat, Billing Method: Direct Bill, Equity Date: 2/26/2008, Last Modified Date: 2/26/2008. Term: 12 Months, Grace Equity Date: 2/26/2008. The "Insured" section lists JOY RIDER, 1 MARINA WAY, Rockford, IL 61108, with contact information: P O BOX 906, 262-548-9880, PEWAUKEE, WI 53072-0906, 800-236-2862. The "Producer" section lists AMERICAN UNDERWRITING MGRS, P O BOX 906, PEWAUKEE, WI 53072-0906, 800-236-2862. The "Agency" section lists 90700, AMERICAN UNDERWRITING MGRS, P O BOX 906, PEWAUKEE, WI 53072-0906, 800-236-2862. Below the policy details is a "Quick Filter" dropdown set to "All". A table below shows transaction history:

	Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	krambsby	2/26/2008
Endorse	2/26/2008	2/26/2009	\$277.00	\$0.00	Committed	krambsby	2/26/2008
Cancel	2/26/2008	2/26/2009	\$0.00	-\$277.00	Committed	krambsby	2/26/2008
Reinstate	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	krambsby	2/26/2008
Cancel	2/27/2008	2/26/2009	\$100.00	-\$177.00	Committed	krambsby	2/26/2008

At the bottom left is a "Done" button, and at the bottom right is a "Local intranet" link.

Once you return to the main [TransACT Screen](#), it will show you that the transaction has been Committed and the insured's policy is cancelled as of the date requested. No forms will be generated.

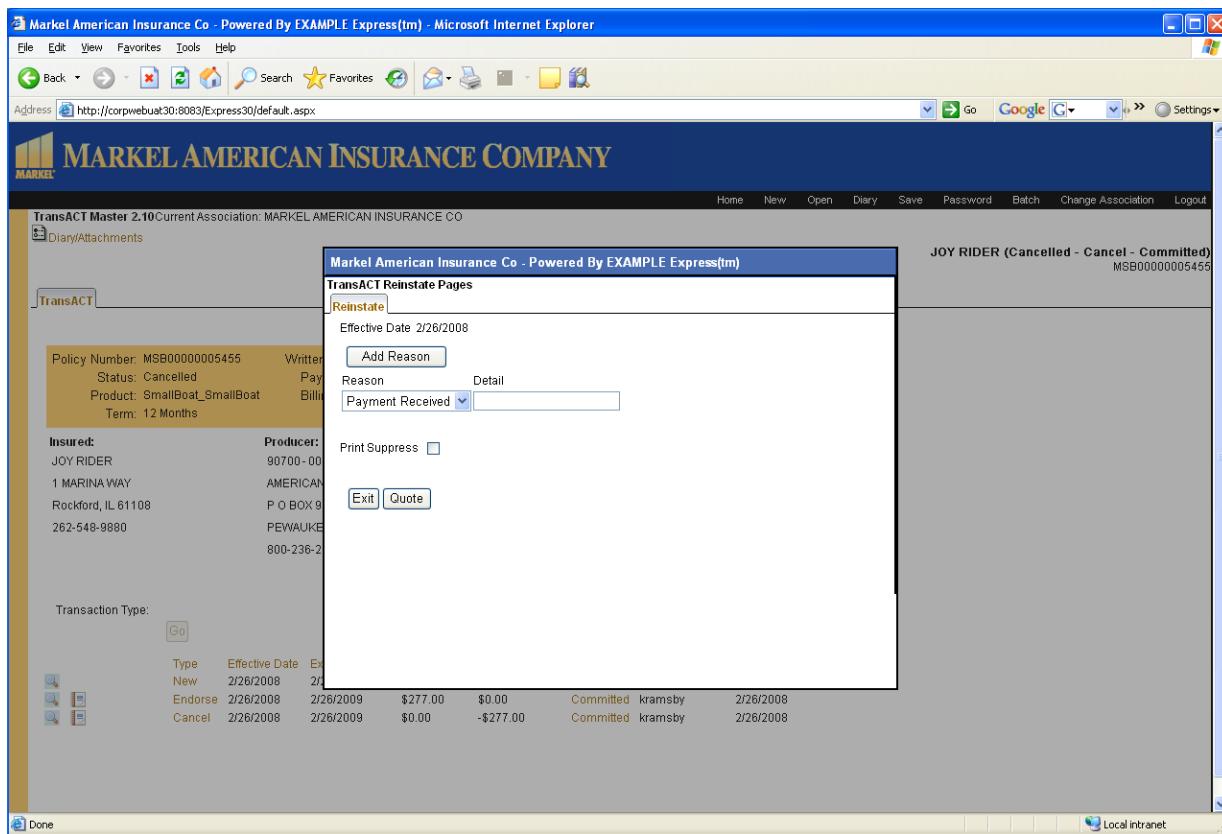
REINSTATE

Reinstate will be available in the dropdown box if this is an allowed transaction on the policy.

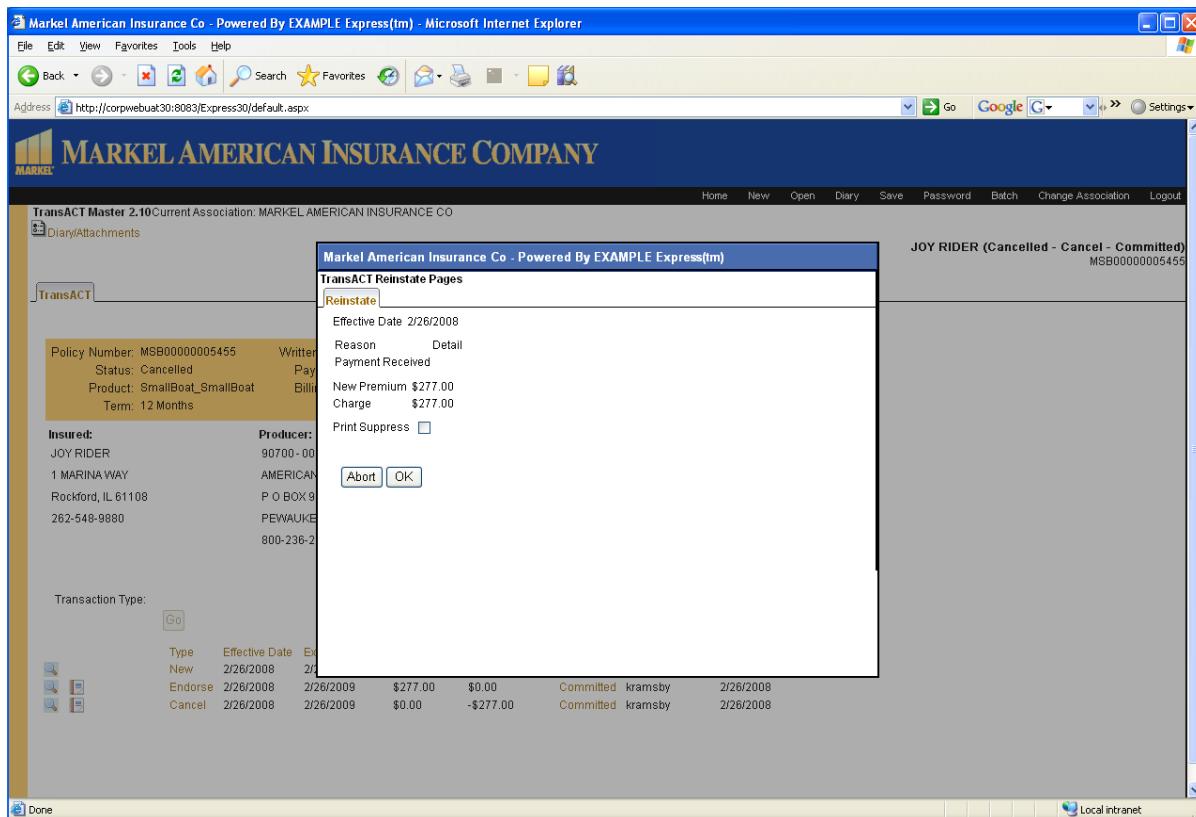
1. Select “Reinstate” and Click “Go”.

The screenshot shows the TransACT Master 2.10 software interface. At the top, it displays "MARKEL AMERICAN INSURANCE COMPANY". Below the header, the policy number "MSB00000005455" is shown along with its status as "Cancelled". The "Reinstate" option is selected in the "Transaction Type" dropdown menu. Other options in the dropdown include "Endorse" and "Cancel". The "Effective Date" field is populated with "2/26/2008". The "Producer" and "Agency" sections provide contact information for the policy. A "Quick Filter" dropdown is set to "All". At the bottom of the screen, there is a toolbar with icons for various functions.

2. The Effective date is automatically populated by the system and the date is equal to the previous cancel date.
3. Choose a reason for the reinstatement and enter any necessary detail. The Add Reason button is to be used if you want to show multiple reasons for reinstatement.



4. Click the “Quote” button to proceed (as shown above).



5. Click “OK” to proceed with Reinstatement OR click the “Abort” button to back out of transaction and be returned to [TransACT Screen](#) without action.

Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back

Address http://corpwebuat30:8083/Express30/default.aspx Go Google Settings

MARKEL AMERICAN INSURANCE COMPANY

TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

JOY RIDER (Cancelled - Cancel - Committed)
MSB00000005455

TransACT

View Service History

Policy Number: MSB00000005455	Written Premium: \$277.00	Effective Date: 2/26/2008	Risk State: IL
Status: InForce	Payment Plan: Full Pay	Expiration Date: 2/26/2009	Rate Effective Date: 2/26/2008
Product: SmallBoat_SmallBoat	Billing Method: Direct Bill	Equity Date:	Last Modified Date: 2/26/2008
Term: 12 Months		Grace Equity Date:	

Insured: JOY RIDER
Producer: 90700-0000001
Agency: 90700
1 MARINA WAY
AMERICAN UNDERWRITING MGRS
Rockford, IL 61108
P O BOX 906
PEWAUKEE, WI 53072-0906
262-548-9880
800-236-2862

Transaction Type: <Select Type> **Quick Filter:** All

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	krambsy	
Endorse	2/26/2008	2/26/2009	\$277.00	\$0.00	Committed	krambsy	
Cancel	2/26/2008	2/26/2009	\$0.00	-\$277.00	Committed	krambsy	
Reinstate	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	krambsy	

Done Local intranet

You will be returned to the [TransACT Screen](#) and the Reinstate transaction should negate the Written Change column and Total Written Premium should be returned to previous number.

REISSUE

Reissue will be available in the dropdown box if this is an allowed transaction on the policy.

A policy may be reissued up to 7 days prior to the effective date of the policy if the cancellation method used is flat. The policy must be rewritten equal to or greater than the current cancellation date if the cancellation method used is pro-rata.

1. Select “Reissue” and Click “Go”.

TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO

JOY RIDER (InForce - Cancel - Committed)
MSB00000005455

Policy Number:	MSB00000005455	Written Premium:	\$277.00	Effective Date:	3/26/2008	Risk State:	IL
Status:	InForce	Payment Plan:	Full Pay	Expiration Date:	2/26/2009	Rate Effective Date:	2/26/2008
Product:	SmallBoat_SmallBoat	Billing Method:	Direct Bill	Equity Date:		Last Modified Date:	2/26/2008
Term:	12 Months			Grace Equity Date:			

Insured: JOY RIDER
1 MARINA WAY
Rockford, IL 61108
262-548-9880

Producer: 90700-0000001
AMERICAN UNDERWRITING MGRS
P O BOX 906
PEWAUKEE, WI 53072-0906
800-236-2862

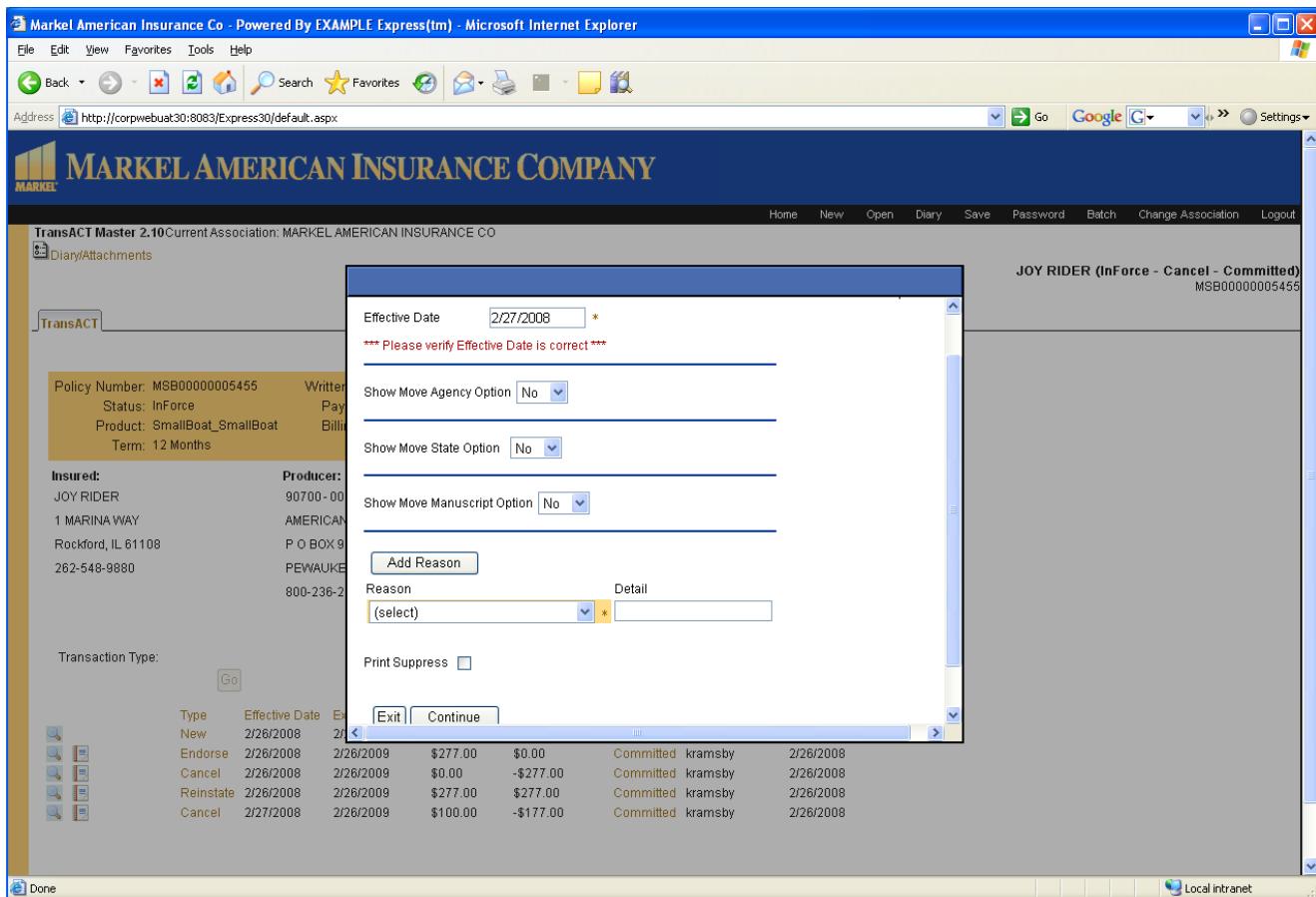
Agency: 90700
AMERICAN UNDERWRITING MGRS
P O BOX 906
PEWAUKEE, WI 53072-0906
800-236-2862

Transaction Type: Reissue **Quick Filter:** All

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	kramsby	2/26/2008
Endorse	2/26/2008	2/26/2009	\$277.00	\$0.00	Committed	kramsby	2/26/2008
Cancel	2/26/2008	2/26/2009	\$0.00	-\$277.00	Committed	kramsby	2/26/2008
Reinstate	2/26/2008	2/26/2009	\$277.00	\$277.00	Committed	kramsby	2/26/2008
Cancel	2/27/2008	2/26/2009	\$100.00	-\$177.00	Committed	kramsby	2/26/2008

2. Verify the effective date of the reissue and change if needed.
3. Click on drop down box to change the no to yes if you are reissuing the policy to change the agent or the mooring state. This will enable you to change the agent or state.
4. If the reissue is for any other reason, click on the drop down box and select the applicable reason. If you have more than one reason you need to enter, click on the add reason box. (See screen print below)

Note: The re-pull insurance score reason can only be used if the insured provides written proof that there was an error on their report that has now been corrected. This will be an audit item.



5. Click "Continue" to proceed or "Exit" to stop processing the reissue.
6. Amend the policy as needed.
7. Click the submission tab to be taken to the last page of the reissue. (See the screen print below)

Market American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

The screenshot shows a Microsoft Internet Explorer window with the title bar "Market American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar contains the URL "http://maicmagicdct:8080/Express21/default.aspx". The main content area displays the "MARKEL AMERICAN INSURANCE COMPANY" logo and navigation links like Home, New, Open, Messages, Password, Batch, and Logout. A banner at the top indicates "MAIC SmallBoat FL (00.01) Current Association: Internal Users". Below this, a section titled "Diary/Attachments" shows a file named "test flaminearned (Cancelled - Reissue-Pending)" with the identifier "MSB00000002016". A tabs menu includes Owner Personal, Boat, Operator, Assignment, Coverage, Risk Location, Additional Interest Info, and Submission. The "Submission" tab is active. The main form displays the name "test flaminearned" and the date "Reissue / 03-14-2007". Under "Premiums", it shows Total Annual Premium: \$205.00, Total Written: \$205.00, Prior Total Annual: \$0.00, and Written Change: \$205.00. The "Issue Notes" section has a "Remarks" field containing a single character. Under "Available Actions", there are "Modify Reasons" and "Complete Issuance" buttons. A "Back" button is located below the "Available Actions" buttons.

8. Add any applicable comments and click “Complete Issuance”.

Market American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

The screenshot shows a Microsoft Internet Explorer window with the title bar "Market American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar contains the URL "http://maicmagicdct:8080/Express21/default.aspx". The main content area displays the "MARKEL AMERICAN INSURANCE COMPANY" logo and navigation links like Home, New, Open, Messages, Save, Password, Batch, and Logout. A banner at the top indicates "MAIC SmallBoat IC (00.02) Current Association: Internal Users". Below this, a section titled "Diary/Attachments" shows a file named "MAIC SmallBoat IC (00.02)" with the identifier "WHITE (Cancelled - Reissue-Pending)" and "MSB00000003007". A tabs menu includes Owner Personal, Boat, Operator, Assignment, Coverage, Risk Location, Additional Interest Info, and Submission. The "Submission" tab is active. The main form displays the name "BRIAN W. WHITE". Under "Premiums", it shows Total Annual Premium: \$764.00 and Total Written: \$764.00. The "Issue Notes" section has a "Remarks" field containing a single character. Under "Available Actions", there is a "Modify Reasons" button. A large modal dialog box is open in the center, titled "Payment Information". It contains fields for "Full Annual Premium" (\$764.00), "Policy Term" (12 Months), "Coverage Start Date" (06-22-2007), and a "View Payment Schedules" button. The "Payment" section includes dropdown menus for "Payment Plan" (set to "Full Pay") and "Payment Type" (set to "(select)"). It also has fields for "Amount" (\$764.00) and "Minimum Payment Amount". At the bottom of the dialog are "Cancel" and "Commit Without Payment" buttons.

9. Verify Pay Plan is correct and click Commit Without Payment.

REVIEW BEFORE RENEW

1. Choose the Review before Renew option and click "Go".

Note: You cannot perform this action on a policy that has a committed cancel, is scheduled for non-renewal or has a pending renewal.

The screenshot shows a Microsoft Internet Explorer window displaying the MARKEL AMERICAN INSURANCE COMPANY TransACT Master 2.10 software. The main title bar reads "Markel American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "http://corpwebuat30:8083/Express30/default.aspx". The page header includes the company logo, the name "MARKEL AMERICAN INSURANCE COMPANY", and navigation links like Home, New, Open, Diary, Save, Password, Batch, Change Association, and Logout. A banner at the top right indicates the policy is "BUD LIGHT (InForce - Endorse - Committed)" with the identifier "MHP0000005086". The main content area displays policy details for policy number MHP0000005086, including written premium (\$5,836.00), effective date (1/23/2008), and expiration date (1/23/2009). It also lists the producer (90700-0000001), agency (90700), and various addresses. Below this, a table shows transaction history with two entries: "New" on 1/23/2008 and "Endorse" on 1/28/2008. A "Quick Filter" dropdown is set to "All".

The Effective date is automatically populated by the system.

Market American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

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MARKEL AMERICAN INSURANCE COMPANY

TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

TransACT

Market American Insurance Co - Powered By EXAMPLE Express(tm)

Review Before Renew Pages

Review Before Renew

Effective Date * * Indicates a required field

Add Reason

Reason Detail

Print Suppress

Exit Continue

Insured: BUD LIGHT
1 MAIN ST
Boneta, UT 84001
282-548-9880

Producer: 90700-000
AMERICAN
P O BOX 90
PEWAUKEE
800-236-26

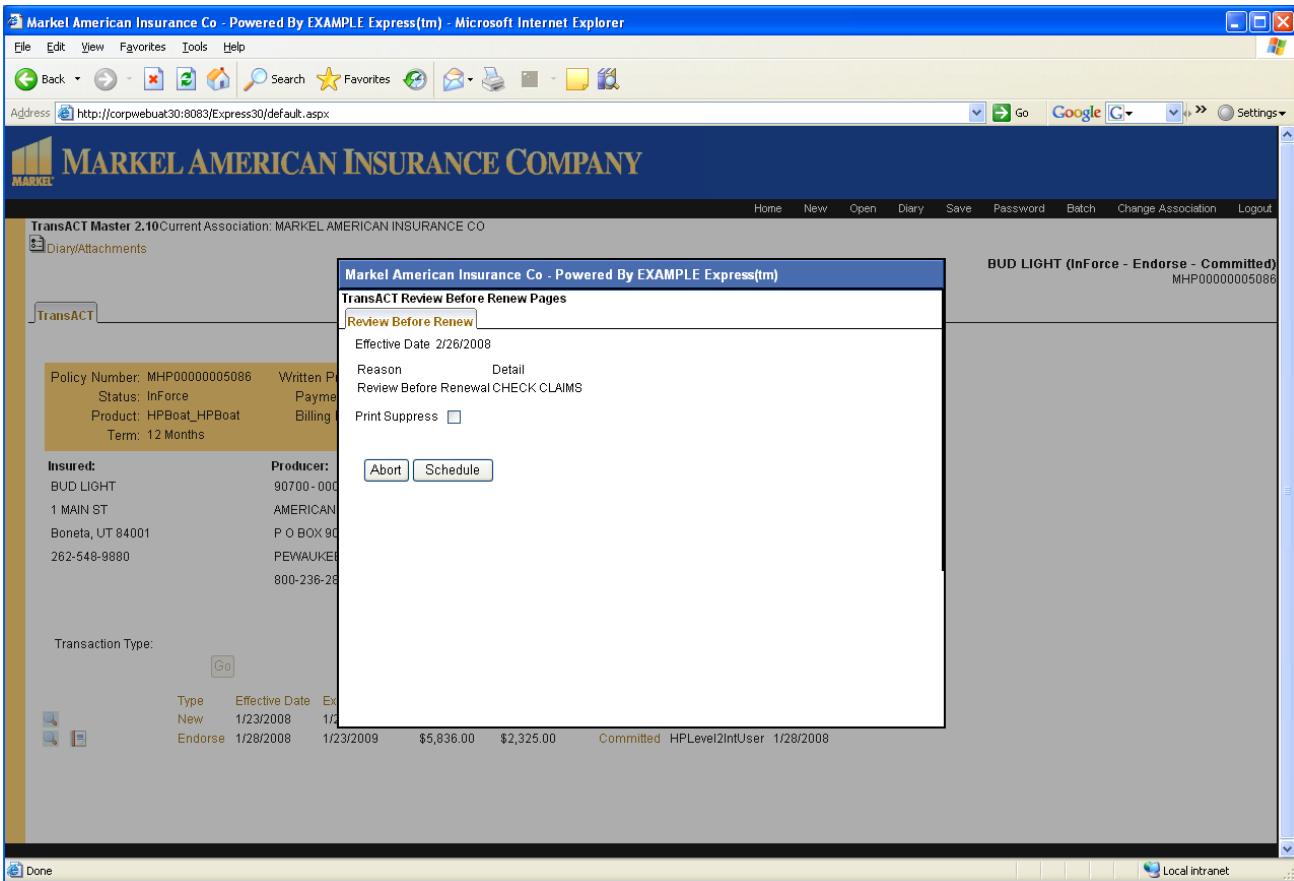
Transaction Type:

Type	Effective Date	Ex
New	1/23/2008	1/23/2009
Endorse	1/28/2008	\$5,836.00 \$2,325.00
		Committed HPLevel2IntUser 1/28/2008

BUD LIGHT (InForce - Endorse - Committed)
MHP00000005086

Done Local intranet

2. Enter in the details of why you want to review before policy automatically renews.
3. Click the “Continue” button to proceed or “Exit” to return to TransACT Screen.



- Click "Abort" if you've changed your mind about marking this policy for Review before Renew and want to be returned to the [TransACT Screen](#) OR click "Schedule" if you want to Mark the policy for Review before Renew.

The policy will show that you have scheduled this policy to be reviewed before it is automatically renewed in the future.

The Review before Renewal report will generate 90 days prior to the renewal date.

TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO

BUD LIGHT (InForce - ReviewBeforeRenew - Scheduled)
MHP00000005086

Policy Number: MHP00000005086	Written Premium: \$5,836.00	Effective Date: 1/23/2008	Risk State: UT
Status: InForce	Payment Plan: Six Installments	Expiration Date: 1/23/2009	Rate Effective Date: 1/23/2008
Product: HPBoat_HPBoat	Billing Method: Direct Bill	Equity Date:	Last Modified Date: 1/28/2008
Term: 12 Months		Grace Equity Date:	

Insured:
BUD LIGHT
1 MAIN ST
Boneta, UT 84001

Producer:
90700-0000001
AMERICAN UNDERWRITING MGRS
P O BOX 906
PEWAUKEE, WI 53072-0906
800-236-2862

Agency:
90700
AMERICAN UNDERWRITING MGRS
P O BOX 906
PEWAUKEE, WI 53072-0906
800-236-2862

This policy has been marked for Review Before Renew.

Transaction Type: <Select Type> [Go]

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	1/23/2008	1/23/2009	\$3,511.00	\$3,511.00	Committed	HPLevel2IntUser	1/28/2008
Endorse	1/28/2008	1/23/2009	\$5,836.00	\$2,325.00	Committed	HPLevel2IntUser	1/28/2008
ReviewBeforeRenew	2/26/2008	1/23/2009	\$5,836.00	\$0.00	Scheduled	kramsby	N/A

6. To review the policy, click the Pencil icon (far left icon on the same transaction line of Review before Renew) and you will be taken into the policy to review it.
7. Once your review is complete, proceed to the [Submission Screen](#) (as shown below).

MAIC HPBoat UT (00.01) Current Association: MARKEL AMERICAN INSURANCE CO

BUD LIGHT (InForce - ReviewBeforeRenew-Scheduled)
MHP00000005086 - HPBoat
AMERICAN UNDERWRITING MGRS - AMERICAN UNDERWRITING MGRS

Owner Personal **Boat** **Operator** **Assignment** **Loss Payee Info** **Coverage** **Submission**

Name: BUD LIGHT
Previous Policy Number: N/A ReviewBeforeRenew / 02-26-2008

Premiums
Total Annual Premium: \$5,869.00 Total Written: \$5,836.00 Prior Total Annual: \$5,836.00 Written Change: \$0.00

This policy has been marked to review before renew.

Billing Instructions
Bill Insured

Billing Information
Name: BUD LIGHT
ZIP: 84001
Address 1: 1 MAIN ST
Address 2:
City/County: Boneta/Duchesne
State: UT

Available Actions

[Modify Reasons] [Review Completed] [Return To Admin]

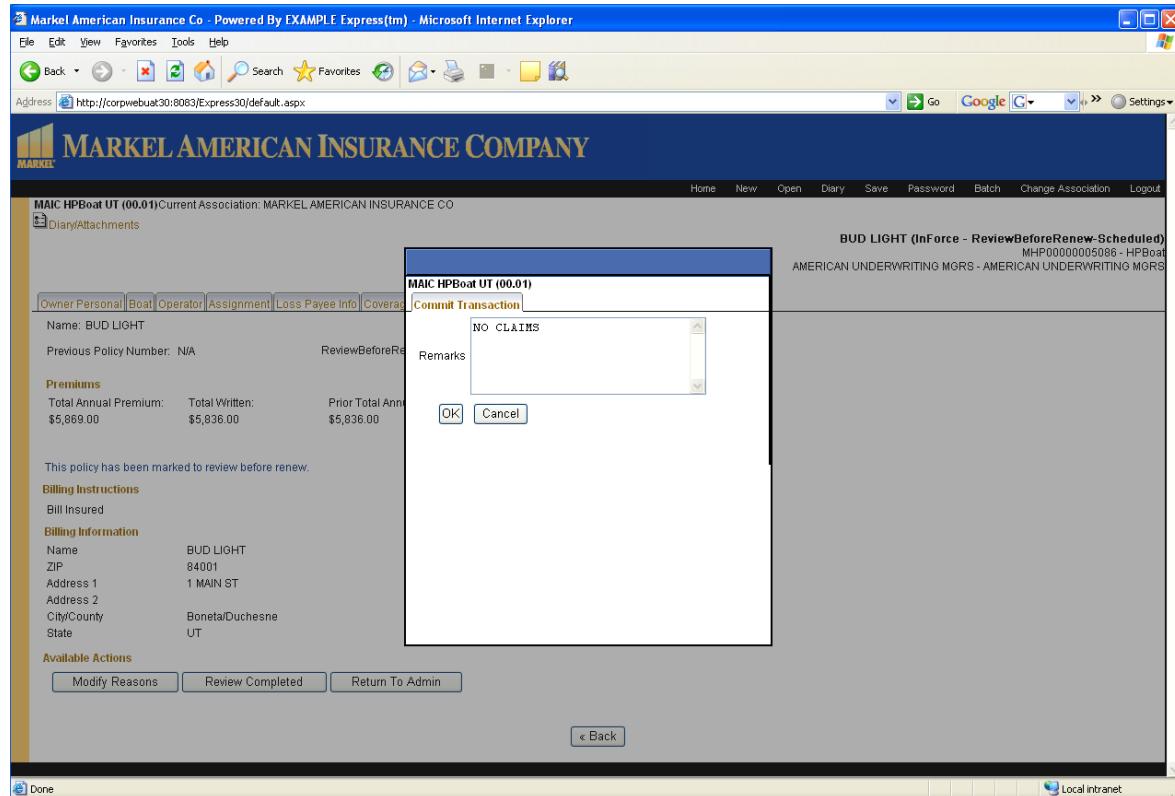
[< Back]

Return to Admin:

This will take you back to the [TransACT Screen](#) and keep your Review before Renew transaction in a ‘Scheduled’ state. This means that it is still in a Review before Renew status and will show up in any messages/reports as such.

Review Completed:

This will take you to the Remarks screen.



7. Type in any remarks that you would like saved with this transaction.
8. Click “OK” to return to the [TransACT Screen](#).

Market American Insurance Co - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Search Favorites Home Mail Print Find

Address: http://corpwebuat30:8083/Express30/default.aspx Go Google Settings

MARKEL AMERICAN INSURANCE COMPANY

TransACT Master 2.10 Current Association: MARKEL AMERICAN INSURANCE CO

Diary/Attachments

BUD LIGHT (InForce - ReviewBeforeRenew - Committed)
MHP00000005086

TransACT

View Service History Apply Payment

Policy Number: MHP00000005086	Written Premium: \$5,836.00	Effective Date: 1/23/2008	Risk State: UT
Status: InForce	Payment Plan: Six Installments	Expiration Date: 1/23/2009	Rate Effective Date: 1/28/2008
Product: HPBoat_HPBoat	Billing Method: Direct Bill	Equity Date:	Last Modified Date: 2/26/2008
Term: 12 Months		Grace Equity Date:	

Insured:	Producer:	Agency:
BUD LIGHT	90700-0000001	90700
1 MAIN ST	AMERICAN UNDERWRITING MGRS	AMERICAN UNDERWRITING MGRS
Boneta, UT 84001	P O BOX 906	P O BOX 906
262-548-9880	PEWAUKEE, WI 53072-0906	PEWAUKEE, WI 53072-0906
	800-236-2862	800-236-2862

Review Before Renew has been Completed.

Transaction Type: <Select Type> Go Quick Filter All

Type	Effective Date	Expiration Date	Total Written	Written Change	Status	Last Modified by	Last Modified Date
New	1/23/2008	1/23/2009	\$3,511.00	\$3,511.00	Committed	HPLevel2IntUser	1/28/2008
Endorse	1/28/2008	1/23/2009	\$5,836.00	\$2,325.00	Committed	HPLevel2IntUser	1/28/2008
ReviewBeforeRenew	2/26/2008	1/23/2009	\$5,836.00	\$0.00	Committed	krambsby	2/26/2008

Done Local intranet

Review before Renew transaction now shows as Committed which means this process is now complete.

RENEW

The Renew function in TransACT is used for either manually renewing the policy OR pre-staging the upcoming renewal with information that needs to be used by the system during the automatic renewal process.

Instructions follow for how to process each type of renewal function. Please ensure that you are processing the renewal in the appropriate manner.

Renewal Prep:

This is pre-staging renewal changes that will get picked up during the normal renewal batch processing cycle. Renewal has a status of 'Scheduled'.

Manually Renew:

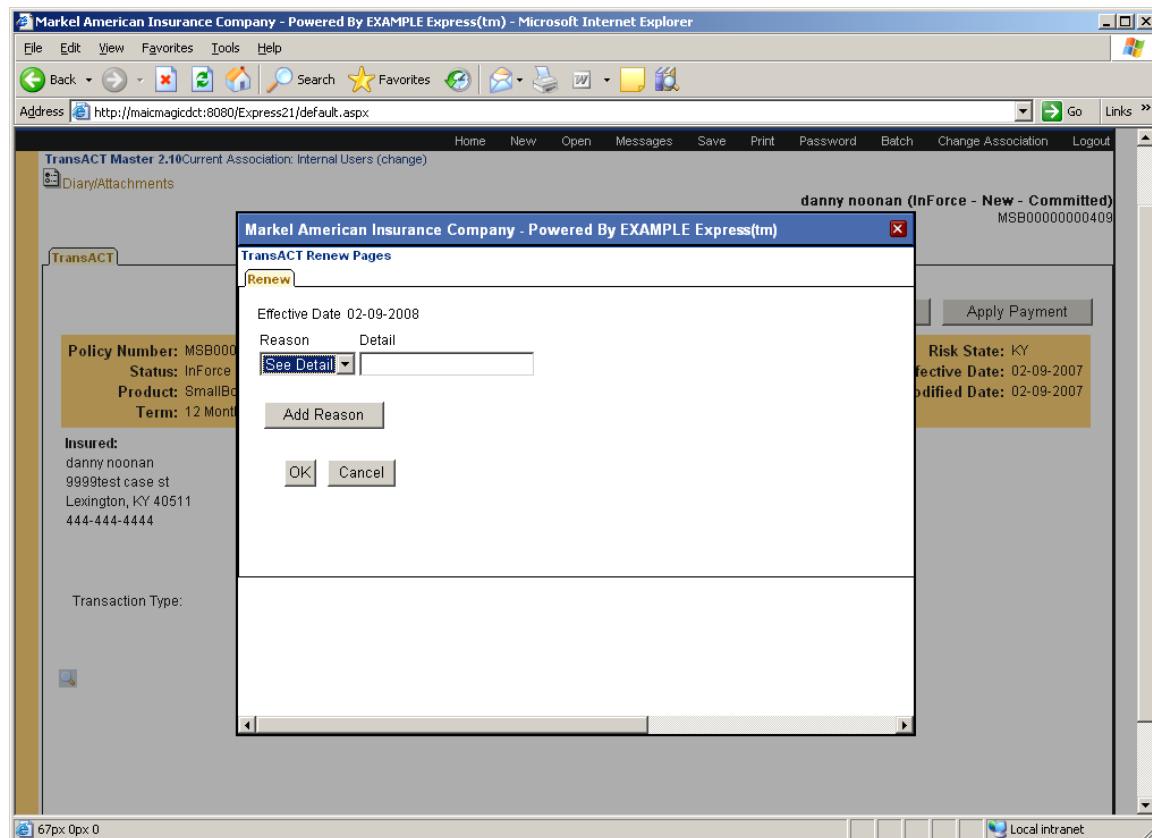
This is actually renewing the policy before the normal renewal process would have applied. Renewal has a status of 'Committed'.

Policy Transaction: Renewal Prep

1. Choose the Renew transaction and click "Go".

The screenshot shows the TransACT Master 2.10 software interface. The title bar reads "Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The main window displays a policy record for "danny noonan (InForce - New - Committed)" with policy number MSB00000000409. Key details shown include: Written Premium: \$673.08, Effective Date: 02-09-2007, Risk State: KY; Status: InForce, Payment Plan: Six Installments, Expiration Date: 02-09-2008, Rate Effective Date: 02-09-2007; Product: SmallBoat_SmallBoat, Billing Method: Agency Renewal, Equity Date:; Term: 12 Months, Grace Equity Date:; Insured: danny noonan, Agency: T_E1SubAgency. Below the main record, a transaction search bar shows "Renew" selected and a "Go" button. A quick filter dropdown is set to "All". At the bottom, a summary row shows: Type: New, Effective Date: 02-09-2007, Total Written: \$673.08, Written Change: \$673.08, Status: Committed, Last Modified by: jfrederick.

2. The effective date is the policy effective date of the renewal term.
3. Put the reason for why you are staging future changes to this policy (that will be picked up in the renewal batch processing).



4. Click "Cancel" to return to TransACT without renewal prepping the policy OR,
5. Click "OK" which will move you forward in the process by taking you into the policy so that you can make your changes.
6. After you have made the necessary changes to the policy, go to the [Submission Screen](#) (as shown below) and click the "Renewal Prep" button which will return you to the [TransACT Screen](#).

The screenshot shows a Microsoft Internet Explorer window for the Markel American Insurance Company. The title bar reads "Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "http://maimagicdct:8080/Express21/default.aspx". The main content area displays the "MARKEL AMERICAN INSURANCE COMPANY" logo. A navigation menu at the top includes Home, New, Open, Messages, Save, Print, Password, Batch, Change Association, and Logout. Below the menu, a message says "MAIC SmallBoat KY (00.01) Current Association: Internal Users (change)". A user profile "danny noonan (InForce - Renew-Pending)" is shown with the identifier "MSB000000000409". A horizontal menu bar below the profile includes Owner Personal, Boat, Operator, Assignment, Coverage, Issue Operator Info, Issue Unit Info, Additional Interest Info, and Submission. The "Submission" tab is selected. A section titled "Rating Messages" lists four items: "This context is not approved to set the status to Referred.", "This context is not approved to set the status to Approved.", "This context is not approved to set the status to Declined.", and "This context is not approved to set the status to Pending.". Below this, the name "danny noonan" and the date "Renew / 02-09-2008" are displayed. A "Premiums" section shows Total Annual Premium: \$673.08, Total Written: \$673.08, Prior Total Annual: \$0.00, and Written Change: \$673.08. A "Available Actions" section contains "Complete Issuance" and "Renewal Prep" buttons, along with a "« Back" link. At the bottom left is a "Done" button, and at the bottom right is a "Local intranet" link.

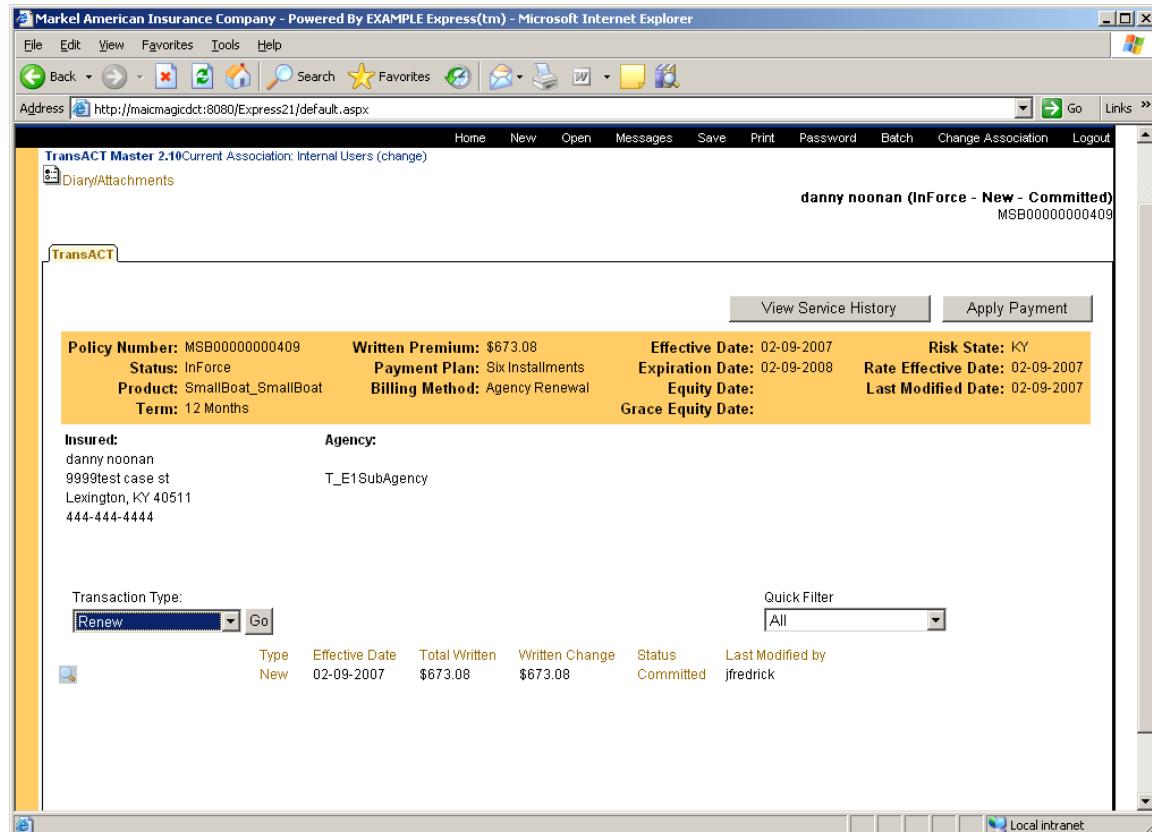
7. The Renewal Prepped policy shows as a scheduled renewal and will show as committed once the actual renewal has been generated and sent to customer.

The screenshot shows a Microsoft Internet Explorer window for TransACT Master 2.10. The title bar reads "Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows "http://maimagicdct:8080/Express21/default.aspx". The main content area displays the "MARKEL AMERICAN INSURANCE COMPANY" logo. A navigation menu at the top includes Home, New, Open, Messages, Save, Print, Password, Batch, Change Association, and Logout. Below the menu, a message says "TransACT Master 2.10 Current Association: Internal Users (change)". A user profile "danny noonan (InForce - Renew - Scheduled)" is shown with the identifier "MSB000000000409". A horizontal menu bar below the profile includes Diary/Attachments, TransACT, View Service History, and Apply Payment. The "TransACT" tab is selected. A summary box displays the following information: Policy Number: MSB000000000409, Written Premium: \$673.08, Effective Date: 02-09-2007, Risk State: KY; Status: InForce, Payment Plan: Six Installments, Expiration Date: 02-09-2008, Rate Effective Date: 02-09-2007; Product: SmallBoat_SmallBoat, Billing Method: Agency Renewal, Equity Date: 02-09-2007; Term: 12 Months, Grace Equity Date: 02-09-2007. Below this, the "Insured:" section lists "danny noonan, 9999test case st, Lexington, KY 40511, 444-444-4444" and the "Agency:" section lists "ga123 - tf sub, T_E1SubAgency". A "Transaction Type:" dropdown is set to "Renew" with a "Go" button. A "Quick Filter" dropdown is set to "All". A table at the bottom shows transaction details: Type (New, Renew), Effective Date (02-09-2007, 02-09-2008), Total Written (\$673.08, \$673.08), Written Change (\$673.08, \$673.08), Status (Committed, Scheduled), and Last Modified by (jfredrick, scisz). At the bottom left is a "Done" button, and at the bottom right is a "Local intranet" link.

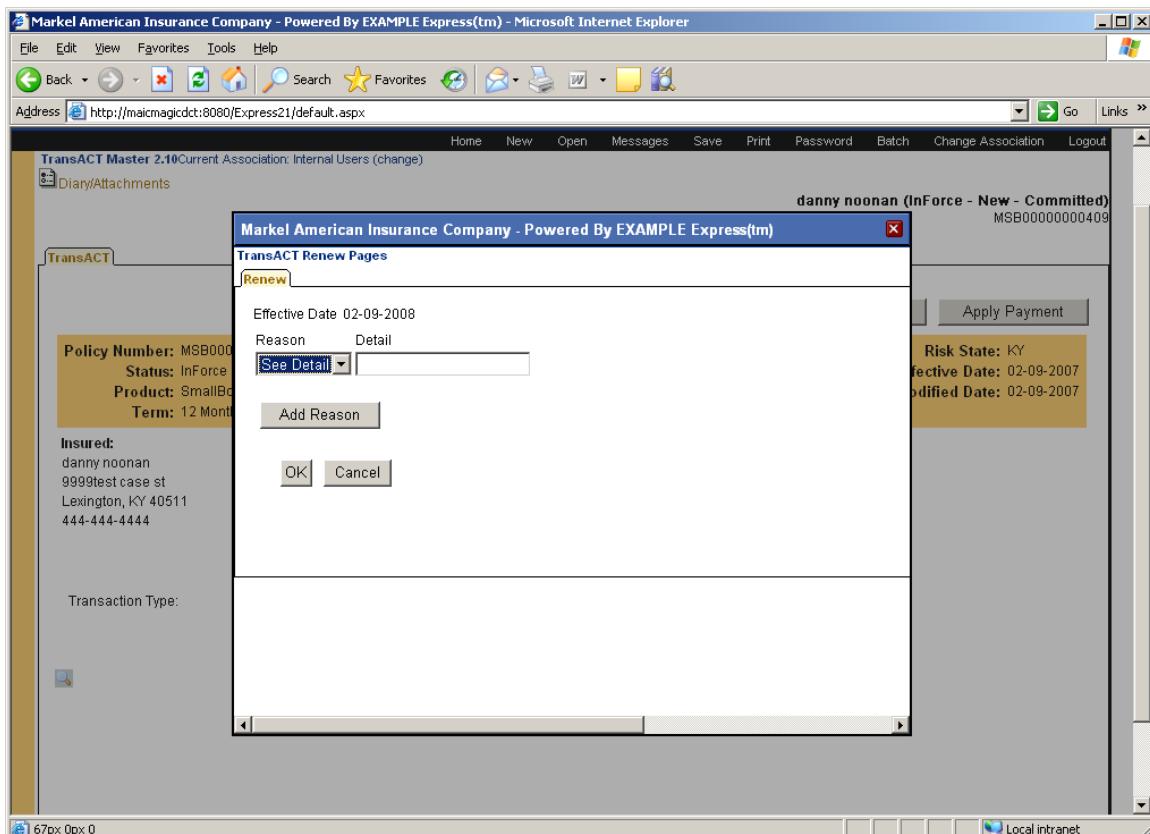
Policy Transaction: Manually Renewing a Policy

1. Choose the Renew transaction and click “Go”.

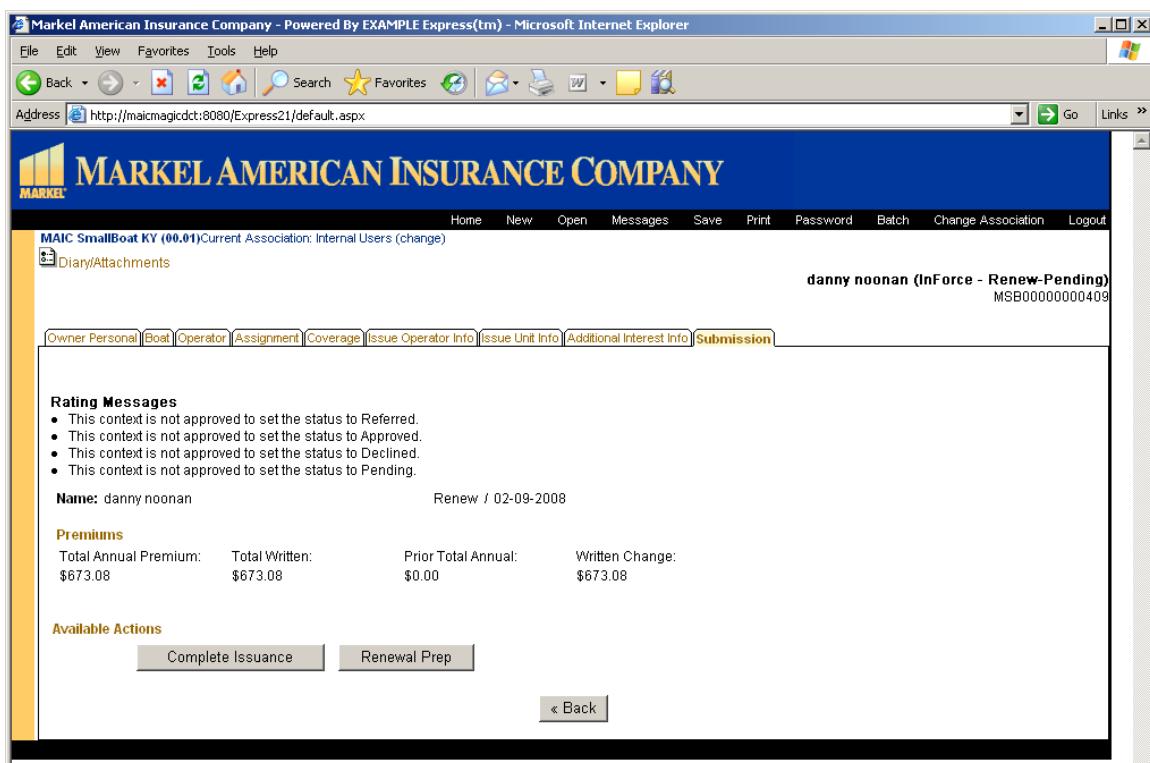
Note: You cannot perform this action on a policy that already has a scheduled renewal. You must abort the scheduled renewal first, before manually renewing policy.



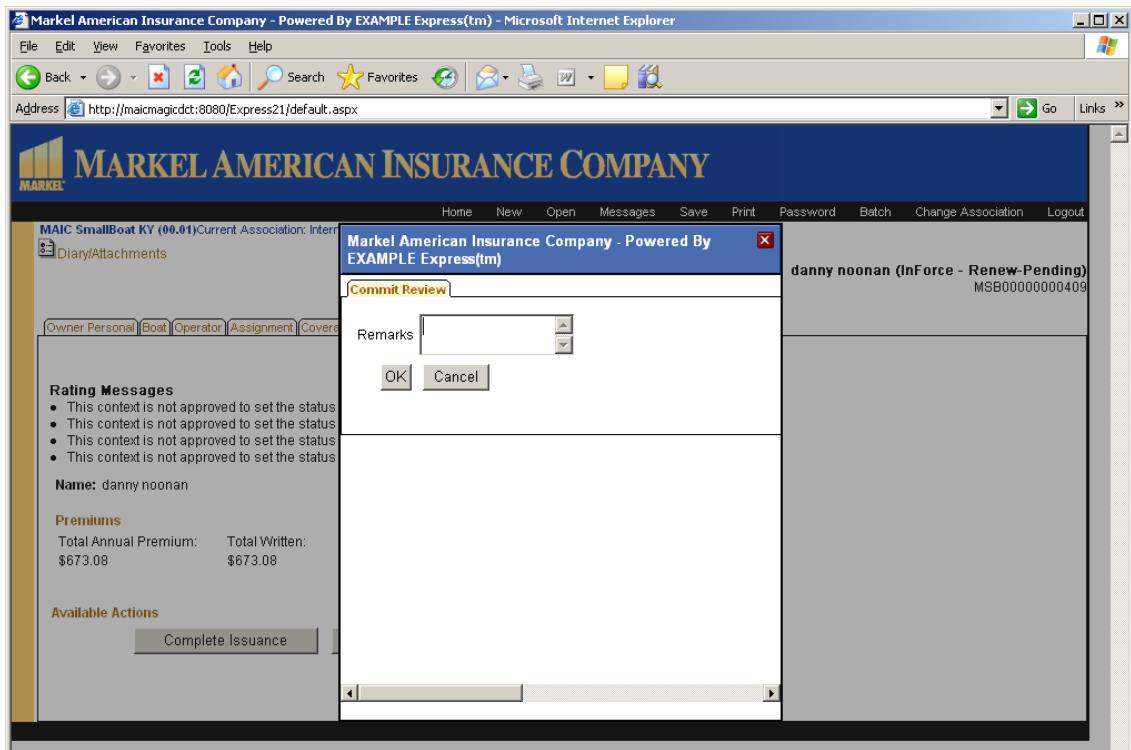
2. The effective date is the policy effective date of the renewal term.
3. Put the reason for manually renewing the policy before the normal renewal process would have applied (see screen shot that follows).
4. Click “Cancel” to return to TransACT without renewing the policy OR,
5. Click “OK” which will move you forward in the process by taking you into the policy for any potential changes. (See Screen shot below)



6. After you have made any change to the policy, go to the [Submission Screen](#) and click "Complete Issuance" to be taken to the [Remarks Screen](#).



Note: The use of the Renewal Prep button is found in documentation of Renewal Prepping a Policy.

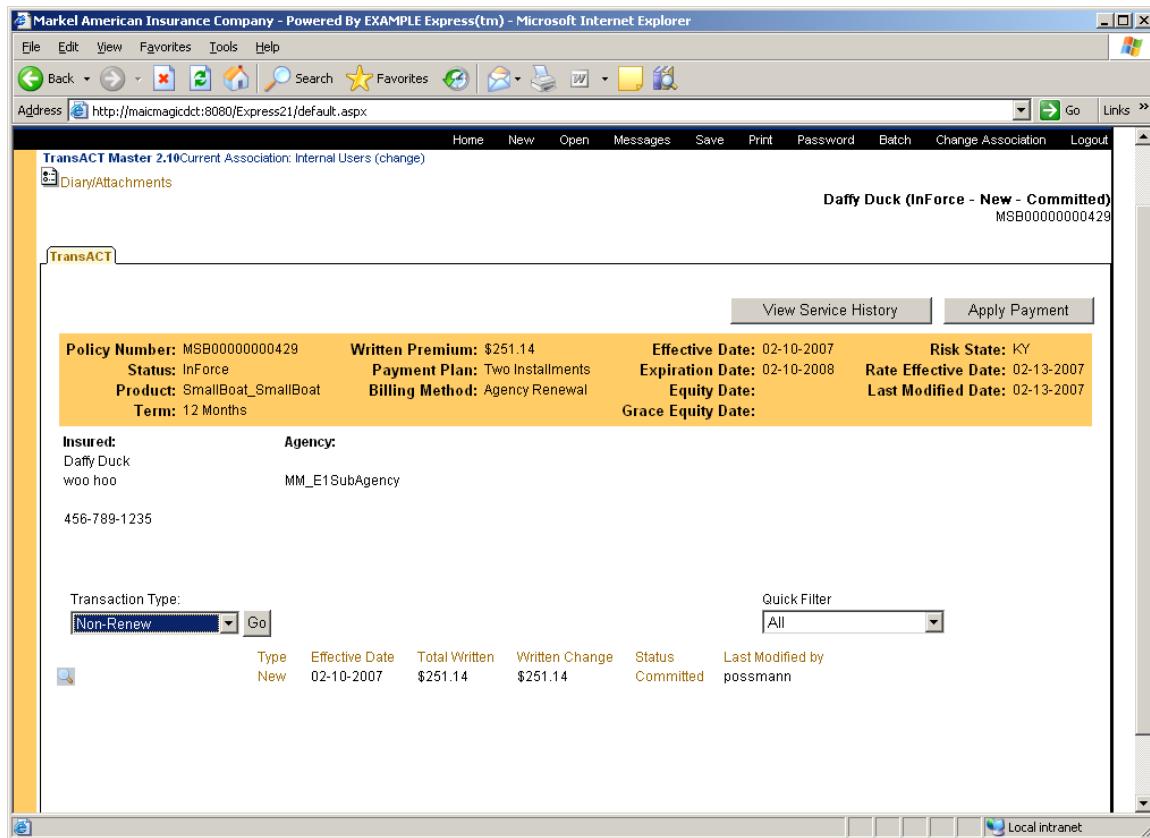


7. Put in your remarks on why you are renewing this policy ahead of time.
8. Click "OK" to complete this transaction and return to the [TransACT Screen](#) OR,
9. Click "Cancel" to move back a step and return to the [Submission Screen](#).

The Policy has been renewed from 2-9-2008 to 2-9-2009.

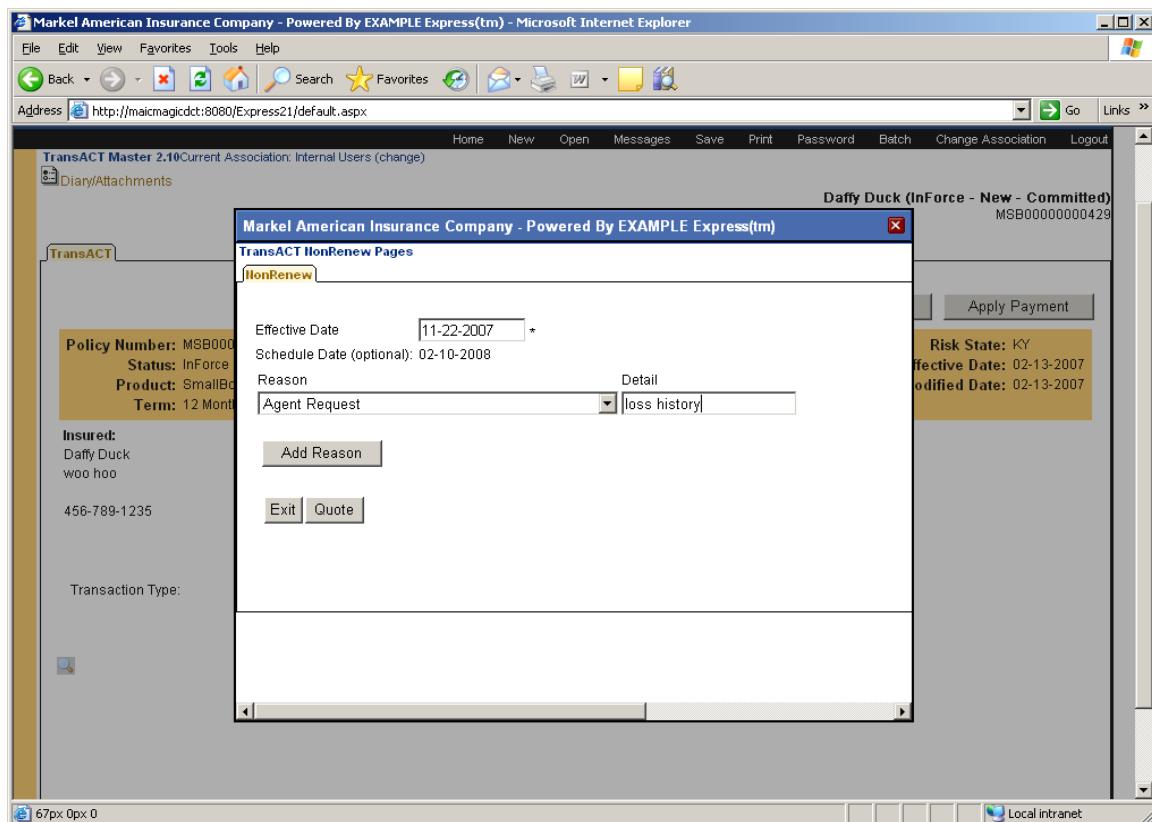
NON-RENEW

1. Select the Non-renew transaction which will only be available on Inforce policies. Click "Go".

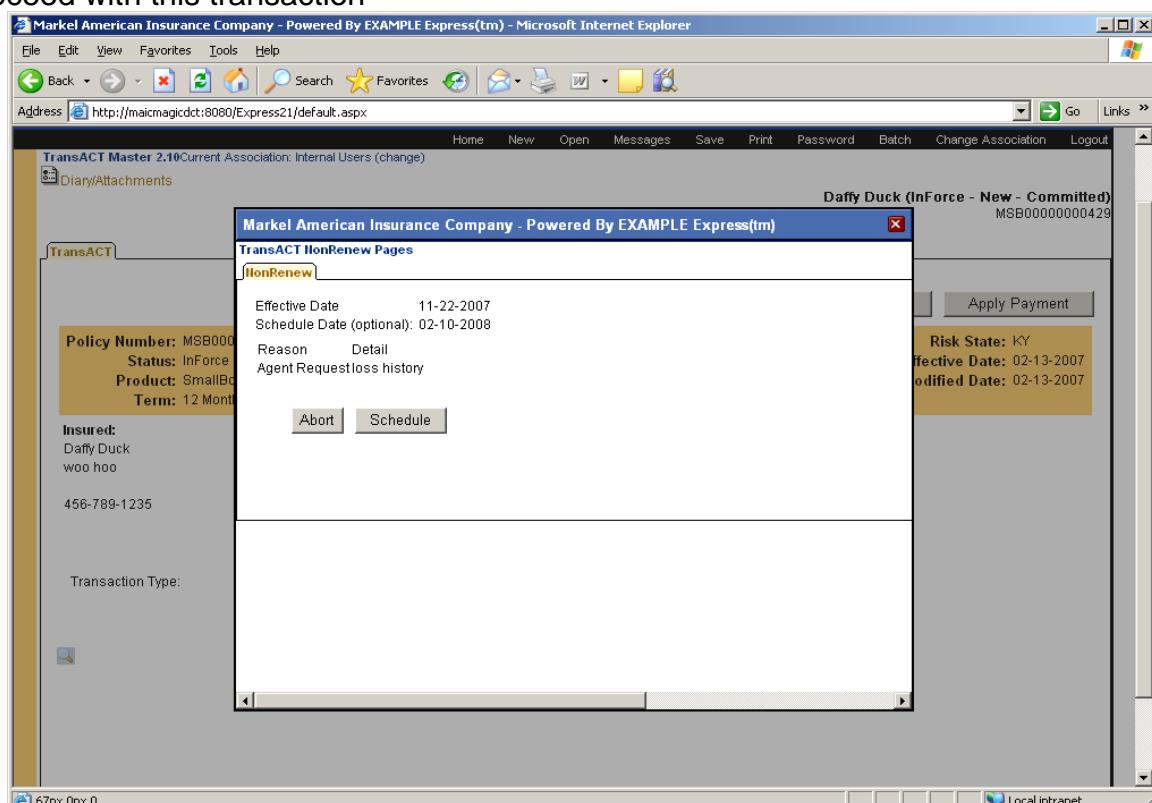


The effective date will be filled in by the system based on proper days notice per the state for non-renewal. The notice will be mailed the next day after this date.

The Scheduled date will be filled in by the system as the policy expiration date.



2. Choose Reason.
3. Enter reason specifics in the Detail field.
4. Click "Abort" to cancel this transaction and return to the **TransACT Screen** OR click "Schedule" to proceed with this transaction



The screenshot shows the MARKEL AMERICAN INSURANCE COMPANY TransACT Master 2.10 software interface. The main title bar reads "MARKEL AMERICAN INSURANCE COMPANY - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "http://mainmagicdct:8080/Express21/default.aspx". The top menu bar includes File, Edit, View, Favorites, Tools, and Help. Below the menu is a toolbar with icons for Back, Forward, Stop, Home, Search, Favorites, and Print.

The main content area displays policy information for "Daffy Duck (InForce - NonRenew - Scheduled)" with policy number MSB00000000429. Key details shown include:

- Policy Number:** MSB00000000429
- Written Premium:** \$251.14
- Effective Date:** 02-10-2007
- Risk State:** KY
- Status:** InForce
- Payment Plan:** Two Installments
- Expiration Date:** 02-10-2008
- Rate Effective Date:** 02-13-2007
- Product:** SmallBoat_SmallBoat
- Billing Method:** Agency Renewal
- Equity Date:**
- Last Modified Date:** 02-13-2007
- Term:** 12 Months
- Grace Equity Date:**

Below the policy details, the "Insured:" section lists "Daffy Duck" and "woo hoo" under "Agency:" "MM_E1SubAgency". A phone number "456-789-1235" is also listed.

The "Transaction Type:" dropdown is set to "Non-Renew" with a "Go" button. To the right is a "Quick Filter" dropdown set to "All". Below these are icons for New, NonRenew, and Delete transactions. A table below shows transaction details:

Type	Effective Date	Total Written	Written Change	Status	Last Modified by
New	02-10-2007	\$251.14	\$251.14	Committed	possmann
NonRenew	11-22-2007	\$251.14	\$0.00	Scheduled	scisz

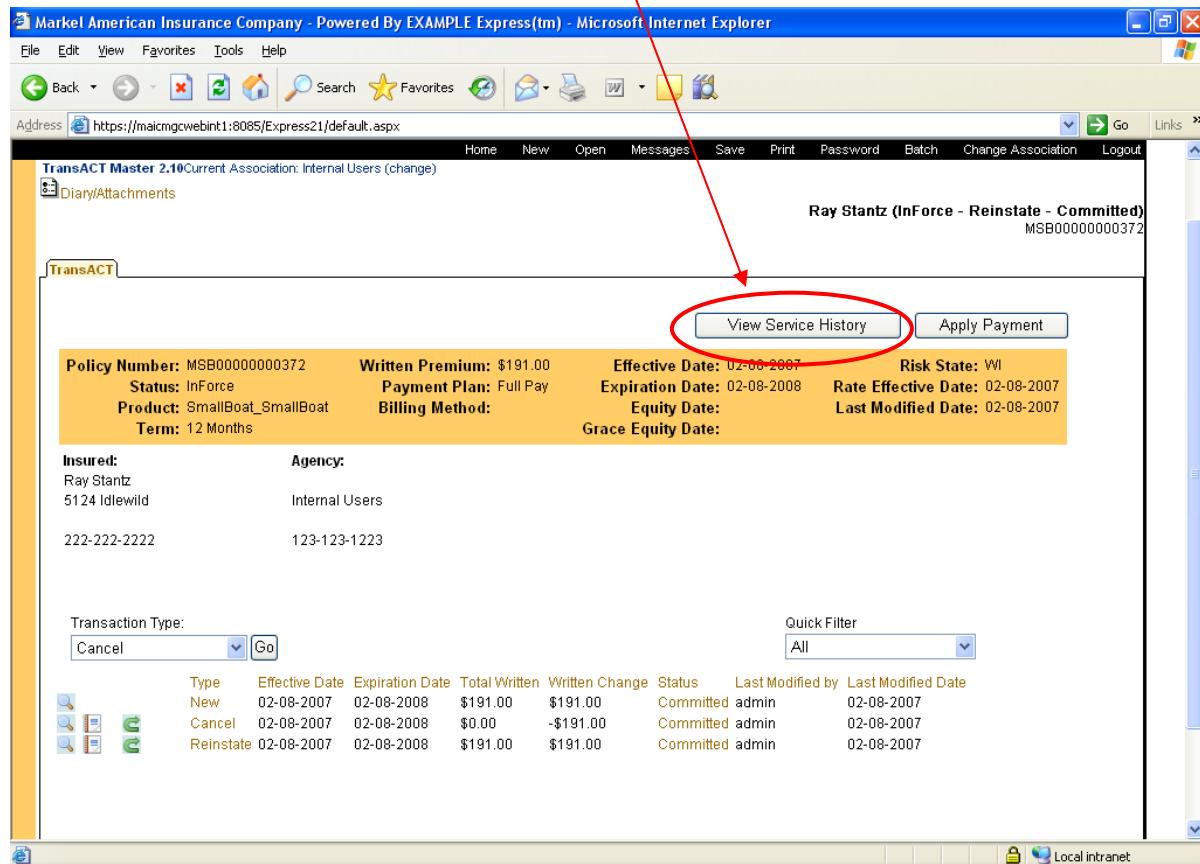
At the bottom left is a "Done" button, and at the bottom right is a "Local intranet" link.

The [TransACT Screen](#) now shows that this policy has been scheduled for Non-renewal. Once the policy expiration date has passed, the non-renewal transaction will now show as 'Committed'.

VIEW SERVICE HISTORY

On the [TransACT Screen](#), there is a “View Service History” button. Clicking on this button will bring up a series of 4 screens:

- Claims History,
- Payment History
- Refund History
- Service History



CLAIMS HISTORY

The [Claims History Screen](#) will display any Claim information associated with the policy. In the example shown below, there is a claim on the policy (see the green box). The Claim #, date of loss, claimant name, status, examiner, etc. are all displayed.

The screenshot shows a Microsoft Internet Explorer window displaying the Market American Insurance Company website. The title bar reads "Market American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The main content area shows a "Service History" section with policy details and an insured party. A green box highlights a table titled "Claims History" which contains one row of data. The "Return" button is visible at the bottom left of the highlighted table.

Service History

Policy Number: MSB000000000372	Premium Written: \$191.00	Effective Date: 02-08-2007	Risk State: WI
Status: In Force	Payment Plan: Full Pay	Expiration Date: 02-08-2008	Rate Effective Date: 02-08-2007
Product: SmallBoat_SmallBoat	Billing Method:	Equity Date	Last Modified Date: 02-08-2007
Term: 12 Months		Grace Equity Date	

Insured: Ray Stantz
5124 Idlewild
222-222-2222

Agency:
Internal Users
this carrier address1
123-123-1223

Claim #	Loss Date	Reported Date	Claimant Name	Status	Closed Date	Coverage	Loss Pd	Examiner	Cause Of Loss
07C0126	02-08-2007	02-08-2007	Ray Stantz	Open		WatercraftLiability	<input type="checkbox"/>	Wayne Nettesheim	CBO

[Return](#) [« Back](#) [Next »](#)

By clicking the "Return" button from this screen you will be taken back to the main [TransACT Screen](#).

Clicking "Next" or clicking the Payment History Tab, will take you to the [Payment History Screen](#).

PAYMENT HISTORY

The [Payment History Screen](#) will display any payments applied to the policy, the installment schedule and the amounts due.

The screenshot shows a Microsoft Internet Explorer window displaying the Market American Insurance Company's payment history screen. The address bar shows the URL <http://maicmagicdct:8080/Express21/default.aspx>. The page contains the following information:

Policy Number:	MSB00000002015	Premium Written:	\$223.00	Effective Date:	03-08-2007	Risk State:	FL
Status:	In Force	Payment Plan:	Two Installments	Expiration Date:	03-08-2008	Rate Effective Date:	03-08-2007
Product:	SmallBoat_SmallBoat	Billing Method:	Direct Bill	Equity Date:		Last Modified Date:	03-08-2007
Term:	12 Months			Grace Equity Date:			

Insured:
test florida
123 main st

414-555-3232

Amounts Due

Unpaid Prem	\$111.50
Unpaid Fees	\$0.00
Current Due	\$0.00
Past Due	\$0.00
Total Due	\$111.50

Installment Schedule

Bill Date	Prem Due	Inst Fee	Total Due	Pmt Amt	Writeoff	Is Billed
03-08-2007	\$111.50	\$3.00	\$114.50	\$114.50	\$0.00	<input type="checkbox"/>
05-07-2007	\$111.50	\$0.00	\$111.50	\$0.00	\$0.00	<input type="checkbox"/>

Payment History

Policy Effective Date	Entered	Pay Type	Ref #	Control #	Payment	NSF Date
03-08-2007	03-13-2007	CH		1741349	\$114.50	

[Return](#) [« Back](#) [Next »](#)

The **Amounts Due** section displays the Unpaid Premium, Unpaid Fees, Current Due, Past Due and Total Due.

The **Installment Schedule** section displays the date due, premium due, installment fees and payment amounts applied to the billing dates.

The **Payment History** section displays the policy effective date, payment type, a reference number (if applicable), a control number, the amount of the payment and an NSF Date (if applicable).

By clicking the "Return" button from this screen you will be taken back to the main [TransACT Screen](#).

Clicking "Next" or clicking the Refund History Tab, will take you to the [Refund History Screen](#).

REFUND HISTORY

The [Refund Screen](#) will show the date of the refund, the payee, the amount and a reference number.

The screenshot shows a Microsoft Internet Explorer window for the Markel American Insurance Company. The title bar reads "Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The menu bar includes File, Edit, View, Favorites, Tools, and Help. The toolbar contains Back, Forward, Stop, Refresh, Home, Search, Favorites, and other standard browser icons. The address bar shows the URL "http://maicmagicdct:8080/Express21/default.aspx". The main content area features the Markel logo and the text "MARKEL AMERICAN INSURANCE COMPANY". Below this, a message says "MAIC SmallBoat KY (00.01) Current Association: Internal Users (change)". A link "Diary/Attachments" is visible. At the top right are links for Home, New, Open, Messages, Save, Print, and Password. Below these are tabs for Claims History, Payment History, and Refund History, with Refund History selected. A yellow box displays policy details: Policy Number MSB00000000546, Effective Date 02-22-2007, Equity Date, Premium Written \$250.06, Status In Force, Expiration Date 02-22-2008, Grace Equity Date, Payment Plan Two Installments, Product SmallBoat_SmallBoat, Term 12 Months, Last Modified Date 02-22-2007, Billing Method Agency Renewal, Risk State KY, and Rate Effective Date 02-22-2007. Another yellow box shows insured information: Insured View With Quote sdoifj Williamstown, KY 41097 654-987-3212, and Agency 12345-123-MMSub MM_E1SubAgency test my address. A table lists a single refund entry: Date 03-05-2007, Payee DB, Amount \$389.50, and Reference Number 0000079187. A blue "Return" button is at the bottom left, and a "« Back" button is at the bottom center.

By clicking the “Return” button from this screen you will be taken back to the main [TransACT Screen](#).

SERVICE HISTORY

The [Refund Screen](#) will display the Service history of the policy.

The screenshot shows a Microsoft Internet Explorer window displaying the service history for a policy. The title bar reads "Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "http://maicmagicddt:8080/Express21/default.aspx". The main content area features the Markel logo and the text "MARKEL AMERICAN INSURANCE COMPANY". Below this, a message says "MAIC SmallBoat FL (00.02) Current Association: MARKEL AMERICAN INSURANCE CO". A navigation menu at the top includes "Home", "New", "Open", "Messages", "Save", "Password", "Batch", and "Logout". The "Service History" tab is selected. The page displays several sections of information:

- Policy Number:** MSB00000004543
Status: In Force
Product: SmallBoat_SmallBoat
Term: 12 Months
- Premium Written:** \$645.39
Payment Plan: Full Pay
Billing Method: Direct Bill
- Effective Date:** 10-18-2007
Expiration Date: 10-18-2008
Equity Date: 06-30-2008
Grace Equity Date: 11-17-2007
- Risk State:** FL
Rate Effective Date: 10-18-2007
Last Modified Date: 10-18-2007
- Insured:**
OST POLICY TEST
FB 15277
Barefoot Beach, FL 34134
262-548-9880
- Producer:**
90700-0000001
AMERICAN UNDERWRITING MGRS
P O BOX 906
PEWAUKEE, WI 53072-0906
800-236-2862
- Agency:**
90700
AMERICAN UNDERWRITING MGRS
P O BOX 906
PEWAUKEE, WI 53072-0906
800-236-2862
- Amounts Due**

	Due Date	Prem Due	Inst Fee	Total Due	Pmt Amt	Writeoff	Is Billed
Unpaid Prem	\$205.03			\$832.24	\$0.00	\$832.24	\$627.21
Unpaid Fees	\$0.00						
Current Due	\$0.00						
Past Due	\$0.00						
Total Due	\$205.03						
- Installment Schedule**

	Due Date	Prem Due	Inst Fee	Total Due	Pmt Amt	Writeoff	Is Billed
11-17-2007	\$832.24	\$0.00	\$0.00	\$832.24	\$627.21	\$0.00	<input type="checkbox"/>
- Account Transaction History**

Action	Effective Date	Entered Date	Written	Taxes	Total Due	Pmt/WO	An. Prem	Booked Date	User ID	Control #
New Business	10-18-2007	10-18-2007	\$621.00	\$0.00	\$6.21	\$627.21	\$0.00	\$627.21	krambsy	
Change	10-18-2007	10-18-2007	\$18.00	\$0.00	\$0.18	\$18.18	\$0.00	\$18.18	krambsy	
Change	01-18-2008	10-18-2007	\$185.00	\$0.00	\$1.85	\$186.85	\$0.00	\$250.48	krambsy	
Change	01-18-2008	10-18-2007	\$13.00	\$0.00	\$0.13	\$13.13	\$0.00	\$250.48	krambsy	
Policy Change	01-18-2008	10-18-2007	-\$185.00	\$0.00	-\$1.85	-\$186.85	\$0.00	-\$250.48	krambsy	
Cash Received	10-18-2007	10-18-2007	\$0.00	\$0.00	\$0.00	\$0.00	\$627.21	\$0.00	krambsy	1949797

Buttons at the bottom include "Return", "< Back", and "Done". The status bar at the bottom right says "Local intranet".

The **Amounts Due** section displays the Unpaid Premium, Unpaid Fees, Current Due, Past Due and Total Due.

The **Installment Schedule** section displays the date due, premium due, installment fees and payment amounts applied to the billing dates.

The **Account Transaction History** will show you the actual account transaction history as it happens. It will display write-offs, money being unapplied and re-applied during the cancel/rewrite-reinstatement process, etc. which will give you more information without having to directly contact our Accounting Department.

By clicking the "Return" button from this screen you will be taken back to the main [TransACT Screen](#).

ACCOUNTING PROCEDURES

APPLY A PAYMENT TO A POLICY

- From the [TransACT Screen](#), click the “Apply Payment” button (as shown below).

The screenshot shows the TransACT Master 2.10 software interface. At the top, there's a menu bar with File, Edit, View, Favorites, Tools, Help, and a toolbar with various icons. The address bar shows the URL <https://maicmgcwebint1:8085/Express21/default.aspx>. The main title is "MARKEL AMERICAN INSURANCE COMPANY". Below the title, it says "TransACT Master 2.10 Current Association: Internal Users (change)" and "daniel day (InForce - New - Committed) MSB000000000026". On the left, there's a sidebar with "TransACT" and "Diary/Attachments". The main content area displays policy details: Policy Number: MSB000000000026, Written Premium: \$226.77, Effective Date: 03-13-2007, Risk State: KT; Status: InForce, Payment Plan: Full Pay, Expiration Date: 03-13-2008, Rate Effective Date: 03-13-2007; Product: SmallBoat_SmallBoat, Billing Method: Direct Bill, Equity Date:; Term: 12 Months, Grace Equity Date:; Insured: daniel day, Agency: MM_E1SubAgency. Below this, there's a section for Transaction Type with a dropdown menu and a Go button, and a Quick Filter dropdown set to All. A table at the bottom lists transaction details: Type (New), Effective Date (03-13-2007), Expiration Date (03-13-2008), Total Written (\$226.77), Written Change (\$226.77), Status (Committed), Last Modified by (kramsby), and Last Modified Date (03-13-2007). The "Apply Payment" button is located in the top right of the main content area, circled in red.

- Choose the “Payment Type” from the drop down box (see screen print below).

Market American Insurance Company - Powered By EXAMPLE Express™ - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address https://maicmgwebint1:8085/Express21/default.aspx

Home New Open Messages Save Password Batch Change Association Logout

MAIC SmallBoat KY (00.01) Current Association: Internal Users (change)

Diary/Attachments

Payment

Policy Information

Full Annual Premium Policy Term
\$226.77 12 Months

Payment

Payment Type: (Select) *

Amount: (Select)
Check
Credit Card
Money Order
Cash

Account overbalance - Code: 1

Apply Payment Cancel

* indicates a required field.

- **Check**—proceed to [Payment by Check](#) section that follows
- **Credit Card**—proceed to [Payment by Credit Card](#) section that follows
- **Money Order**—proceed to [Payment by Money Order](#) section that follows
- **Cash**—proceed to [Payment by Cash](#) section that follows

Payment By Check:

1. Enter the amount of the payment in the “Amount” field.
2. Enter the check number in the “Payment Reference #” field.

The screenshot shows a Microsoft Internet Explorer window with the title bar "Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "http://maicmagicdct:8080/Express21/default.aspx". The main content area displays the "MARKEL AMERICAN INSURANCE COMPANY" logo. Below it, a navigation menu includes Home, New, Open, Messages, Save, Print, Password, Batch, Change Association, and Logout. A sub-menu for "MAIC SmallBoat KV (00.01) Current Association: Internal Users (change)" is visible. The main form is titled "Payment". It contains sections for "Policy Information" (Full Annual Premium: \$236.17, Policy Term: 12 Months) and "Payment" (Payment Type: Check, Amount: 236.17, Payment Reference #: 456). A note at the top right indicates that an asterisk (*) indicates a required field. At the bottom are "Apply Payment" and "Cancel" buttons.

3. Click “Apply Payment” button to apply the payment or “Cancel” to terminate transaction.

Once all checks have been applied for the day:

1. Complete the “General Agent Daily Deposits Form” see the form that follows.
2. Complete a remote deposit bank account deposit slip (specific per bank).
3. Fax or email both documents to Vivian Wright.

NOTE: Only general agents with existing remote deposit bank accounts can apply payments using the “Check” payment type option.

Agents are required to deposit these funds into their established remote deposit account on a daily basis. Subsequently, these accounts are swept on a monthly basis based on daily deposit activity.

All agents are encouraged to utilize the more efficient “Credit Card” option for applying payments to New Business or Active Policies.

Payment By Credit Card:

After selecting Credit Card as the payment type, the screen will change appearance as shown in red below.

The screenshot shows a Microsoft Internet Explorer window for Market American Insurance Company. The main page displays policy details like total premium (\$439.43), coverage period (12 Months, 02-21-2007), and a 'View Payment Schedules' button. A central modal dialog box is open, titled 'Payment'. It contains fields for 'Payment Plan' (Three Installments) and 'Payment Type' (Credit Card). The 'Amount' field shows \$201.43. Below these, a question 'Is Cardholder same as Insured?' has 'Yes' selected. A red box highlights the 'Cardholder Information' section, which includes fields for Name, Address, City, Zip Code, and State. Another red box highlights the 'Credit Card Information' section, which includes dropdowns for Credit Card Type and Credit Card #, and fields for Security Code, Expiration Date, and a note about processing. The note at the bottom of the dialog reads: 'When you click on the Submit Payment button, credit card payment will be processed. Do not click on the button more than once or you risk the credit card being charged multiple times. Please wait for the confirmation page which will display when the policy has been issued.'

1. If the cardholder is the same as the insured, click 'Yes'. The fields will populate with the applicant's mailing address information.
2. If the cardholder is not the same as the insured, click 'No'.
3. Enter in all of the required credit card information.
4. Once complete, click "Submit Payment".

NOTE: Do not click on the button more than once or you risk the credit card being charged multiple times.

5. Please wait for the confirmation page (as shown below).

6. Click "Complete Issuance".

The screenshot shows a Microsoft Internet Explorer window with the title bar "Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "http://mailmagicdct:8080/Express21/default.aspx". The main content area displays a policy summary for "MAIC SmallBoat KY (00.01)". The summary includes "Policy Information" such as "Full Annual Premium: \$439.43", "Policy Term: 12 Months", and "Coverage Start Date: 02-21-2007". Below this, a message states "Credit Card payment has been processed. Please select the Complete Issuance Button." A large blue button labeled "Complete Issuance" is prominently displayed. To the right of the main window, a sidebar shows "Association: Logout" and a status message "Policy - New-Pending QT00000002665". On the left, a sidebar titled "Owner Personal" lists "MAIC SmallBoat KY (00.01)" and "Diary/Attachments". Other sections include "Rating Messages", "Premiums" (Total Annual Premium: \$439.43), "Issue Notes" (Remarks: [empty]), and "Available Actions" (Refer). Navigation buttons like "Back", "Home", and "Print" are visible at the bottom.

7. An **Issue Confirmation Screen** will appear advising that the policy has been issued and that output will be mailed out the next business day. (see below) The assigned policy number will be visible in the upper left-hand corner of the orange summary box.

The screenshot shows a Microsoft Internet Explorer window with the title bar "Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "http://mailmagicdct:8080/Express21/default.aspx". The main content area displays an "Issue Confirmation" message: "Thank you for your business! Policy output will be mailed on the next business day. Please call our office if you have any questions." Below this, an orange summary box contains detailed policy information: "Policy Number: MSB00000000527", "Premium Written: \$439.43", "Effective Date: 02-21-2007", "Risk State: KY", "Status: In Force", "Product: SmallBoat_SmallBoat", "Billing Method: Three Installments", "Expiration Date: 02-21-2008", "Rate Effective Date: 02-21-2007", "Term: 12 Months", "Equity Date: 02-21-2007", and "Grace Equity Date: 02-21-2007". Further down, the "Insured:" section lists "Holy Mackerel", "222 Main Street", "Bowling Green, KY 42103", and "111-111-1111". The "Agency:" section lists "GA123 - 123" and "MM_E2SubAgency". At the bottom, there are input fields for "Unit: HIN" (containing "2000 APEX INFLATABLES sd") and "22222". Buttons for "Print/Output" and "Proceed to Policy Admin" are at the bottom. The sidebar on the left shows "MAIC SmallBoat KY (00.01) Current Association: Internal Users (change)", "Diary/Attachments", and "Home", "New", "Open", "Messages", "Save", "Print", "Password", "Batch", "Change Association", "Logout".

8. Also, as soon as output is available, it may be printed in your office.
9. At this point, you may exit the policy by starting a new transaction, or proceed to Policy Administration.

Payment By Money Order:

1. Enter the amount of the payment in the “Amount” field.
2. Enter the money order number in the “Payment Reference #” field.

The screenshot shows a Microsoft Internet Explorer window with the title "Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "http://maicmagicdct:8080/Express21/default.aspx". The main content area has a blue header with the "MARKEL AMERICAN INSURANCE COMPANY" logo. Below the header, there's a navigation bar with links like Home, New, Open, Messages, Save, Print, Password, Batch, Change Association, and Logout. A message "MAIC SmallBoat KV (00.01) Current Association: Internal Users (change)" is displayed. The main form is titled "Payment". It contains sections for "Policy Information" (Full Annual Premium: \$236.17, Policy Term: 12 Months) and "Payment". The "Payment" section includes fields for "Payment Type" (set to "Money Order"), "Amount" (\$236.17), and "Payment Reference #". A note at the top right says "* indicates a required field". At the bottom of the form are "Apply Payment" and "Cancel" buttons.

3. Click “Apply Payment” button to apply the payment or “Cancel” to terminate transaction.

Once all the money orders have been applied for the day:

1. Complete the “General Agent Daily Deposits Form” see the form that follows.
2. Complete a remote deposit bank account deposit slip (specific per bank).
3. Fax or email both documents to Vivian Wright.

NOTE: Only general agents with existing remote deposit bank accounts can apply payments using the “Money Order” payment type option.

Agents are required to deposit these funds into their established remote deposit account on a daily basis. Subsequently, these accounts are swept on a monthly basis based on daily deposit activity.

All agents are encouraged to utilize the more efficient “Credit Card” option for applying payments to New Business or Active Policies.

Payment By Cash:

1. Enter the amount of the payment in the “Amount” field.
2. Click “Apply Payment” button to apply the payment or “Cancel” to terminate transaction.

The screenshot shows a Microsoft Internet Explorer window with the title bar "Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "http://maimagicdct:8080/Express21/default.aspx". The main content area has a blue header with the "MARKEL AMERICAN INSURANCE COMPANY" logo. Below the header, there's a message "MAIC SmallBoat KY (00.01) Current Association: Internal Users (change)". A sidebar on the left lists "Diary/Attachments" and "Payment". The "Payment" section contains "Policy Information" (Full Annual Premium: \$236.17, Policy Term: 12 Months), a "Payment" form with "Payment Type" set to "Cash" and "Amount" set to \$236.17, and buttons for "Apply Payment" and "Cancel". A note at the top right says "* indicates a required field."

Once all the cash has been applied for the day:

1. Complete the “General Agent Daily Deposits Form.”
2. Complete a remote deposit bank account deposit slip (specific per bank).
3. Fax or email both documents to Vivian Wright.

NOTE: Only general agents with existing remote deposit bank accounts can apply payments using the “Cash” payment type option.

Agents are required to deposit these funds into their established remote deposit account on a daily basis. Subsequently, these accounts are swept on a monthly basis based on daily deposit activity.

All agents are encouraged to utilize the more efficient “Credit Card” option for applying payments to New Business or Active Policies.

APPLY A PAYMENT & ACTIVATE A POLICY

If the Policy is ready to issue (providing you have the Authority or Approval to do so) click the “Complete Issuance” button shown below.

The screenshot shows a Microsoft Internet Explorer window displaying the Markel American Insurance Company application. The title bar reads "Markel American Insurance Company - Powered By EXAMPLE Express(tm) - Microsoft Internet Explorer". The address bar shows the URL "https://mai1mgcwebint1:8085/Express21/default.aspx". The main header features the Markel logo and the text "MARKEL AMERICAN INSURANCE COMPANY". The navigation menu includes Home, New, Open, Messages, Save, Print, Password, Batch, Change Association, and Logout. Below the menu, a message indicates "MAIC SmallBoat KY (00.01) Current Association: Internal Users (change)". A user profile is shown on the right: "Scott Drew (Quote - New-Pending) QT00000002323". The main content area has tabs for Owner Personal, Boat, Operator, Assignment, Coverage, Issue Operator Info, Risk Location, Additional Interest Info, and Submission. The Submission tab is active. On the left, there are sections for Name (Scott Drew), Premiums (Total Annual Premium: \$355.88, Total Written: \$355.88, Prior Total Annual: \$0.00, Written Change: \$355.88), and Issue Notes (Remarks). At the bottom, there are buttons for Refer, Complete Issuance (circled in red), and Save for Later. A "« Back" link is also present.

Complete Issuance:

Clicking the “Complete Issuance” button will load the Payment Information. A Payment box will appear as shown below.

Payment Information:

At the top of the payment box, the total policy premium is displayed as well as the policy term.

1. Choose the desired Effective Date
2. Click on “View Payment Schedules” to view what installment plans are available based on that premium amount.
3. Pick the chosen payment plan from the drop down box.
4. Choose the Payment Type--**Refer to the specific procedures prior to this section for payment by Cash, Credit Card, Check or Money Order.**
5. Enter the Payment amount, if applicable. The system will advise what the minimum payment amount is.
6. Once the above has been entered, click “Complete Issuance” to finish issuing the policy or “Cancel” to discontinue issuing the policy.
7. An **Issue Confirmation Screen** will appear advising that the policy has been issued and that output will be mailed out the next business day. (see below) The assigned policy number will be visible in the upper left-hand corner of the orange summary box.

File Edit View Favorites Tools Help

Address http://maicmagicdct:8080/Express21/default.aspx

MARKEL AMERICAN INSURANCE COMPANY

Home New Open Messages Save Print Password Batch Change Association Logout

MAIC SmallBoat KY (00.01) Current Association: Internal Users (change)

Diary/Attachments

Issue Confirmation

Issue Confirmation

Thank you for your business!
Policy output will be mailed on the next business day.
Please call our office if you have any questions.

Policy Number: MSB00000000527 **Premium Written:** \$439.43
Status: In Force **Payment Plan:** Three Installments
Product: SmallBoat_SmallBoat **Billing Method:**
Term: 12 Months

Effective Date: 02-21-2007 **Risk State:** KY
Expiration Date: 02-21-2008 **Rate Effective Date:** 02-21-2007
Equity Date: Grace Equity Date: **Last Modified Date:** 02-21-2007

Insured:
Holy Mackerel
222 Main Street
Bowling Green, KY 42103
111-1111-1111

Agency:
GA123 - 123
MM_E2SubAgency

Unit	HIN
2000 APEX INFLATABLES sd	22222

Print/Output Proceed to Policy Admin

- At this point, you may exit the policy by starting a new transaction, or proceed to Policy Administration.

Proceed to Policy Admin:

The "Proceed to Policy Admin" button will take you back to the TransACT screen.

For Accounting/Check Deposits/etc.
please see the beginning of the Accounting section.

USER MAINTENANCE

If changes (deletion or addition) in staffing occur, MAIC must be notified in writing by the agency Principal or other person designated by the Principal to effect user changes.

The Request to Amend Established User document will need be sent to MAIC's Technical Services Dept. at PTS@markelcorp.com or faxed to 262-547-9436. Once they have completed the User change, they will confirm that the user has either been disabled, or if a new user, their new password.

Changes to sub-producer staff should also be communicated in the same manner.

The User change form can be found on www.markelmarine.com as well as in the Appendix at the back of this manual.

AGENT MAINTENANCE

To setup a sub-producer in the system, a written request must be provided by the contracted General Agent. If you intend to provide the MAGIC system to your sub-producer some additional information will be required.

The Request to Add a Sub-Producer form will need to be sent to the BA Group at PBG@markelcorp.com. The information necessary to setup the sub-producer will be provided to the contracted General Agent to deliver to the sub-producer.

Once the sub-producer has been established, should Users change, they may be added/deleted using the user change form. (See the previous section regarding User Maintenance.) All User changes should be sent by the General Agent to PTS@markelcorp.com .

The Agent Set-up Form can be found on www.markelmarine.com as well as in the Appendix at the back of this manual.

TECHNICAL ASSISTANCE

For technical assistance with the MAGIC system, please contact MAIC's Technical Support Department at 1-800-236-2862 x.3334.

APPENDIX

Request to Amend Established User

Request to Add a Sub-Producer

Markel American Insurance Company
Request to Amend Established User

Email to: pts@markelcorp.com Phone: 800-236-2862 Fax: 262-547-9436

This form is to be utilized for users that are already established in the system. It will be accepted only if completed and submitted by the GA Agency.

Please complete the following information for the GA Agency:

GA Name:			GA Number:	
GA Phone:			GA Fax:	
Form Contact Name:			Form Contact Email Address:	

<input type="checkbox"/> Addition	<input type="checkbox"/> Deletion	Username Markel IT Use Only	Password Markel IT Use Only	Date of Activation Markel IT Use Only
User First & Last Name				
Email Address				

If change is related to your SubProducer, please complete the following:

SubProducer Name:			SubProducer Number:	
-------------------	--	--	---------------------	--

<input type="checkbox"/> Addition	<input type="checkbox"/> Deletion	Username Markel IT Use Only	Password Markel IT Use Only	Date of Activation Markel IT Use Only
User First & Last Name				
Email Address				

If change is related to your SubProducer, please complete the following:

SubProducer Name:			SubProducer Number	
-------------------	--	--	--------------------	--

<input type="checkbox"/> Addition	<input type="checkbox"/> Deletion	Username Markel IT Use Only	Password Markel IT Use Only	Date of Activation Markel IT Use Only
User First & Last Name				
Email Address				

If change is related to your SubProducer, please complete the following:

SubProducer Name:			SubProducer Number	
-------------------	--	--	--------------------	--

<input type="checkbox"/> Addition	<input type="checkbox"/> Deletion	Username Markel IT Use Only	Password Markel IT Use Only	Date of Activation Markel IT Use Only
User First & Last Name				
Email Address				

If change is related to your SubProducer, please complete the following:

SubProducer Name:			SubProducer Number	
-------------------	--	--	--------------------	--

GA Principal / Manager Approval:	
Request Date of Change:	

MAGIC
Markel American Insurance Company
Request to add a SubProducer

Email to: pbg@markelcorp.com -or- fax: 262-548-0117

Due to security requirements brought on by the Sarbanes Oxley Act, each of your subproducers must be assigned an individual user ID and password that will be connecting to our system. Complete a separate form for each subproducer.
In order for us to begin setting up this Producer remotely, we need the information provided below.

Please complete the following information:

GA Agency Name:		GA Number:	
SubProducer Name:		SubProducer Number:	
SubProducer Federal ID #:		Is SubProducer Incorporated?	<input type="checkbox"/> YES <input type="checkbox"/> NO
SubProducer Website Address:			
SubProducer Address:			
SubProducer City, State & Zip:			
SubProducer Phone:	SubProducer Fax Number:		
Form Contact Name:	Form Contact Email address:		

Producer User First & Last Name	Producer E-Mail Address	Username Markel IT Use Only	Password Markel IT Use Only	Date of Activation Markel IT Use Only